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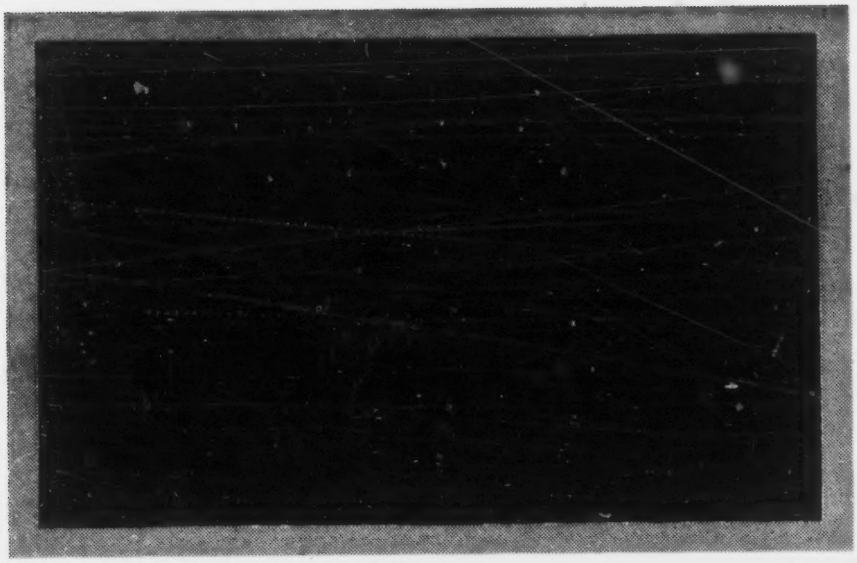
HAWAII

ECONOMIC RESEARCH REPORTS



RESEARCH AND ECONOMIC ANALYSIS DIVISION

DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

Fourth Quarter 1984
and
First Quarter 1985

QUARTERLY STATISTICAL AND ECONOMIC REPORT - STATE OF HAWAII

Fourth Quarter 1984 and First Quarter 1985

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore, Karen Yamashita and Tu Duc Pham.

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1. The Economy -- Recent Trends

Hawaii's economy turned in a mixed performance during the last half of 1984 as the continued strength in tourism was balanced by weaknesses in sugar, pineapple, and construction. As a result, the preliminary estimate of the average number of jobs in 1984 showed little increase from 1983.

Nationally, the economy slowed during the last half of 1984, although not enough to increase unemployment or sideline the recovery which is now two years old. Most economists are forecasting moderate growth of the U.S. economy through 1985, although the unresolved issue of the Federal deficit and what measures should or can be taken to reduce the deficit cloud the outlook for 1986 and beyond. Hawaii should experience continued growth in tourism during 1985 with improvement in construction, defense spending, and at least a temporary stabilizing of the declines in sugar and pineapple employment.

The Hawaii Economy

Tourism to Hawaii in 1984 increased an estimated 11 percent -- the best annual growth the visitor industry has seen since 1976. The actual number of visitors to Hawaii in 1984 exceeded 4.8 million. Tourism from the Mainland U.S. increased 8 percent in 1984. Eastbound tourism (mainly foreign visitors from the Orient and Pacific areas) surged 16 percent in 1984 and tourism from Canada increased an even greater 26 percent for the year. This was a very surprising performance for these foreign markets given the high value of the dollar compared to other currencies, which has made U.S. goods and services more expensive to foreigners.

The result of the upturn in tourism was an acceleration of job growth in related industries. Hotel jobs increased 3.6 percent in number during 1984 with other service jobs up 1.3 percent. Jobs in the trade sector (retailing and wholesaling) increased 2.4 percent in 1984.

Outside of tourism, however, several important sectors of the economy did rather poorly in 1984. Construction, especially, lagged behind as high interest rates during most of the year and several crippling labor disputes in the second half reduced construction receipts by 3 percent for the first nine months of 1984 based on excise tax data. Construction employment fell an estimated 10 percent for all of 1984.

Sugar and pineapple continued to experience reductions in acreage and jobs during the last half of 1984. The most notable loss was the closure of Puna Sugar Company on the Big Island which idled the roughly 200 workers remaining since the company began phasing out operations in 1983. Sugar industry field and processing jobs declined 5 and 3 percent respectively in 1984. Pineapple field and processing jobs declined 8 and 15 percent respectively due primarily to the 1983 closure of the Del Monte canning plant in Honolulu. Ironically, the market for canned pineapple appeared to be improving in 1984 as the recovery of the national economy continued.

Defense spending in Hawaii for the first nine months of 1984 showed no increase over the same 1983 period. This was mainly the result of a decline in local procurement from the elevated levels of the past several years. Military and civilian pay showed modest increases in 1984.

As the result of having only one major industry (tourism) contributing to growth in 1984, preliminary estimates of the overall State jobcount showed only a slight 0.3 percent increase from 1983, with employment gains from tourism offset by losses in other areas of the economy.

Figures 1-1 and 1-2 compare long-term trends for several selected economic indicators for the State and national levels. The growth rate in employment (or jobs) has been affected by recessions over the past 12 years at both the State and national levels. The prosperous economic period between 1975 and 1979 allowed both Hawaii and the nation to experience accelerating employment growth before the two recessions between 1980 and 1982 undercut growth rates. As figure 1-1 indicates, the 1981-82 recession affected Hawaii's employment growth rate almost as severely as was the case nationally and considerably more than during the 1974-75 recession. As the graph shows, Hawaii's employment growth rate in the period after the 1981-82 recession has lagged behind the nation as a whole. A somewhat similar lag occurred after the 1974-75 recession. Hawaii's employment growth in 1984, as reflected in the preliminary data, therefore shows that Hawaii's employment growth rate is below the national rate. One of the reasons for such a sluggish performance of Hawaii's economy in 1984, in spite of the record growth of the visitor arrivals, has been the poor performance of the Hawaii construction industry.

Figure 1-2 compares the recovery in construction at the national and State levels following the most recent recession. Construction employment in Hawaii initially responded well to the end of the recession but flattened out and actually began to decline again in 1983 and 1984. In the meantime, construction employment at the national level continued a slow but steady upswing during the recovery. The sluggish performance of Hawaii's construction industry over the past two years reflects the sustained high level of interest rates, high vacancy rates in commercial office space in Honolulu and, of course, the effects of recent labor disputes.

Figure 1-1

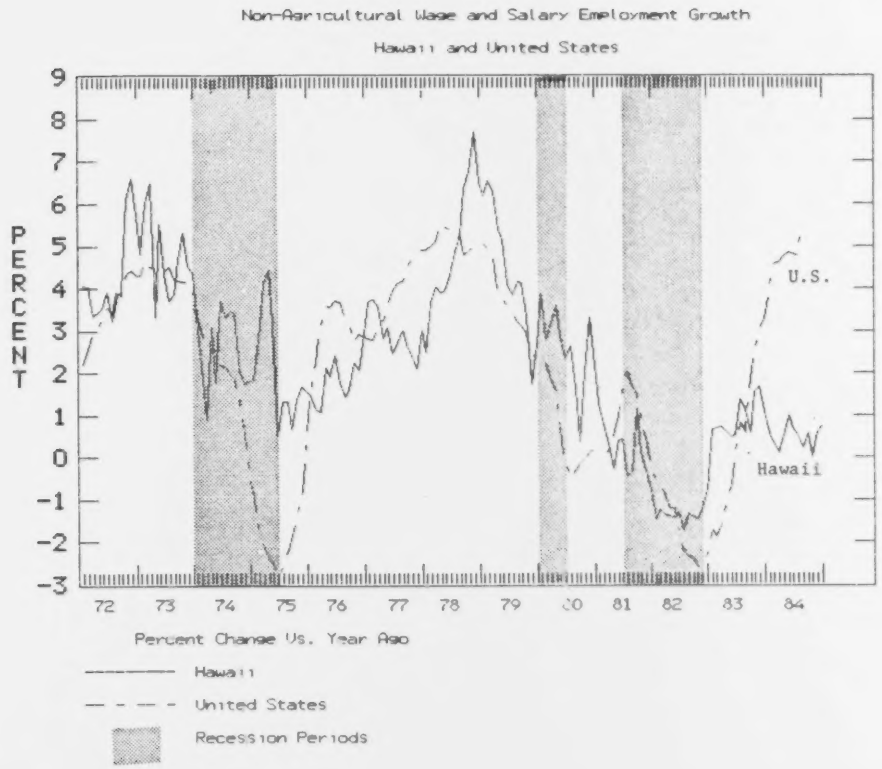
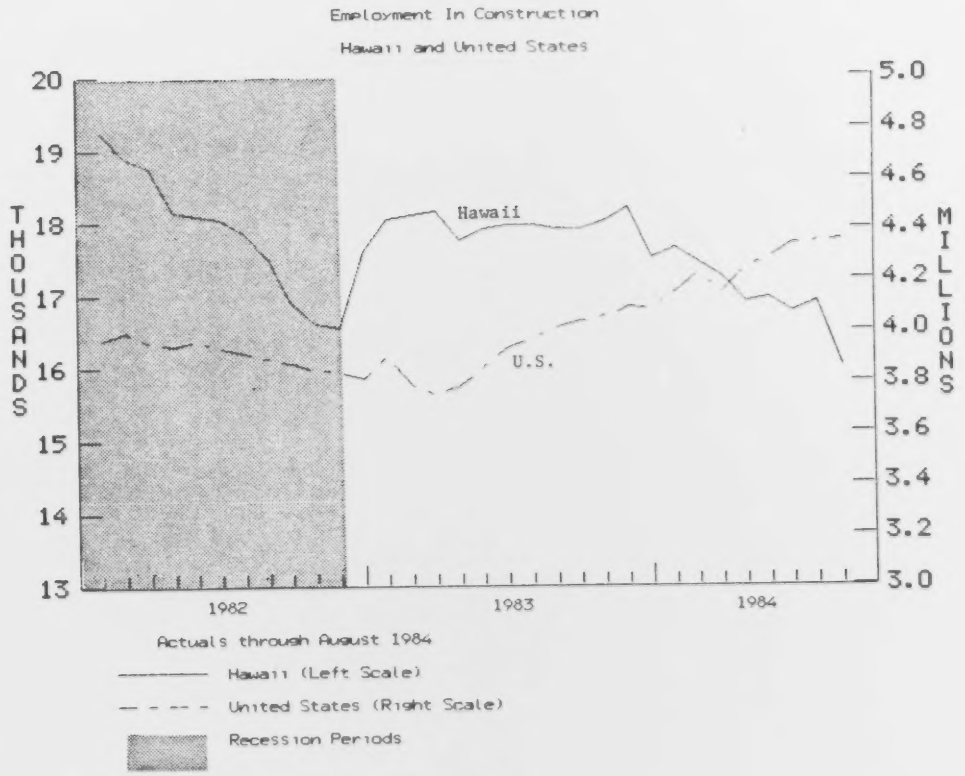


Figure 1-2



The U.S. Economy

The second half of 1984 marked the end of the initial stage of the U.S. economic recovery which began in early 1983. The period was marked by a drop in the growth of Gross National Product (GNP) to an annual rate of 3.5 percent in the second half of 1984 after registering growth at an annual rate of over 8 percent in the first half of the year. The growth rate in the third quarter of the year declined to a low 1.6 percent annual rate, but improved to a 3.9 percent rate in the last quarter.

Three factors were primarily responsible for the slower growth in the second half of the year: (1) a slower rate of growth in consumer expenditures; (2) a sharp increase in the purchases of imports which undercut domestic production; and (3) declines in residential construction. Capital spending by business remained strong in the second half with an annual growth rate of 16 percent in the second quarter alone.

With the end of the initial recovery phase, the growth rate of the economy would slow down to around 3 percent during 1985. Recession is not likely as disposable personal income in the U.S. continued to increase in the last half of 1984. This indicates that the slowdown in consumption was not due to a lack of spending power but rather represented a temporary pause by consumers which would likely not persist.

In response to the economy's slowdown in the second half of 1984, the Federal Reserve loosened credit conditions. This led to a decline in the prime lending rate to 10.5 percent by mid January 1985, from a high of 13 percent from June to September of last year. Long-term bond and mortgage rates also declined modestly in the last half of 1984. Consumer rates of inflation and unemployment nationwide increased at annualized 4.1 percent and 7.2 percent respectively in December 1984.

The problem of the Federal deficit continued to pose problems for policy-makers trying to reduce it and economists trying to trace its effects. The administration has apparently not been able to devise a budget plan that will reduce the deficit in half by 1988 without cutting social security expenditures or raising taxes -- a promise made during the 1984 presidential campaign. The Congress will try its hand at deficit reduction in its 1985 session, but with considerably more uncertainty as to the nature of the outcome.

Many economists think that inflows of foreign savings are helping to fund the Federal deficit and wonder how long the U.S. can count on the supply of foreign funds. The estimates of the deficits in future years are tenuous due mainly to the uncertainty of the rate of economic growth that can be expected. The slowing of the economy in late 1984 raised the estimate of the FY 1985 deficit from the $180 billion level to around $200 billion.

2. Economic Outlook for the Nation and Hawaii

Outlook for the Nation

Most major economic forecasts for the nation expect the economy to continue growing through 1985, although at about half the rate, on average, as last year. For 1984 as a whole GNP grew an estimated 6.8 percent. GNP is expected to grow between 3 and 3.5 percent this year. The lowest major national forecast expects a 1.3 percent decline in 1985 GNP, although this is the only one of 50 major forecasts to project a decline. The most optimistic forecast anticipates a 4.6 percent growth rate while the average of all forecasts is a 3.3 percent increase.

Beyond 1985 there is considerably less certainty about the course of the economy at the national level. The average national forecast for 1986 projects a slowing of GNP growth to about 2.6 percent. However, the highest national forecast projects an average increase of GNP in 1986 of 5.7 percent while the lowest forecast anticipates a 1.7 percent decline. Forecasters are not confident about 1986 and beyond, mostly because the future course of national economic policy is not known at this time and will be decided in the political arena in coming months.

For Hawaii in 1985, the economic recovery that began in the State last year should continue at a more moderate pace with more sectors of the economy joining in. The State's most important industry, tourism, is expected to grow about 6 percent next year in terms of visitor arrivals. A slower rate of tourism growth than the 10 percent increase experienced during last year is expected, primarily because the U.S. economy is forecast to grow more slowly than in 1984 and because the large increases in visitors Hawaii experienced last year will be statistically more difficult to achieve two years in a row. Moreover, foreign tourism will likely slow the most following the impressive gains in 1984. Still, a 6 percent increase is above the average 4 percent increase per year in visitors projected between 1985 and 1990.

Now that the recent labor disputes being experienced by the construction industry have been resolved, considerable activity in that sector of the economy can be expected through both catch-up work and an improving economy. The real value of construction could increase as much as 28 percent in 1985, and there is a good chance that regardless of what happens to the rest of the economy in 1986, commitments for construction made in 1985 will result in another good year for the industry in 1986.

Defense expenditures should show some increase in 1985, since the moderate decline in local procurement experienced in 1984 will probably not be repeated in 1985.

No growth in sugar and pineapple sales is forecast into the foreseeable future due to the tremendous uncertainty in these industries.

Inflation (as measured by the Honolulu CPI) is expected to remain stable in 1985 at about 4 percent, then increase to 5 percent in 1986. About a 7 to 8 percent increase in total personal income is anticipated for Hawaii in current dollars during 1985.

The number of jobs in the State should show more solid growth in 1985 as construction activity increases and as the loss of jobs in sugar and pineapple hopefully stabilizes. Overall, about a 3 percent increase in jobs is expected in 1985.

Tables 2-1 and 2-2 summarize the economic outlook for the nation and Hawaii in 1985 and 1986.

Table 2-1.-- COMPOSITE FORECAST OF KEY U.S. ECONOMIC VARIABLES: 1985 AND 1986

Variable	1985				1986				1985	1986
	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4		
Real GNP	3.2	3.9	3.6	3.0	2.5	2.1	1.9	2.4	3.3	2.6
GNP deflator	4.0	4.2	4.5	4.8	5.0	5.2	5.2	5.1	4.1	5.0
Consumer price index	4.1	4.3	4.6	4.9	5.1	5.3	5.3	5.2	4.2	5.1
3-month treasury bill rate	8.1	8.5	8.9	9.1	9.2	9.1	8.9	8.6	8.6	9.0
Aaa corporate bond rate	11.9	12.0	12.1	12.2	12.1	12.0	11.7	11.5	12.0	11.8

Source: Eggart Economic Enterprises, Blue Chip Economic Indicators, January 10, 1985.

Table 2-2.-- FORECAST OF SELECTED ECONOMIC AND POPULATION VARIABLES FOR HAWAII: 1985 AND 1986

Variable	1985	1986
Total population (thousands)	1,057.8	1,073.5
Annual percent change 1/	1.2	1.2
Total personal income (billions of current $) ...	14.3	15.3
Annual percent change	7.6	7.5
*Honolulu consumer price index (CPI-U; annual average)	295.8	310.6
Annual percent change	4.0	5.0
Total jobs (thousands)	460.3	475.0
Annual percent change	3.2	3.2
*Total visitor arrivals (millions)	5.1	5.3
Annual percent change	6.0	4.0
*Processed sugar sales (millions $) 2/	429.0	429.0
Annual percent change	0.0	0.0
*Processed pineapple sales (millions $) 2/	190.0	190.0
Annual percent change	0.0	0.0

* Indicates an assumption upon which the Hawaii Econometric Model determined the other variables.

1/ Percent change from previous fiscal year.

2/ As measured by the unadjusted excise tax base for the variable.

Source: Department of Planning and Economic Development, Hawaii Econometric Forecasting Model Project.

3. Income and Prices

Hawaii's recovery from the 1981-1982 recession has lagged behind the Mainland recovery. Total personal income in Hawaii during the first nine months of 1984 increased 7.9 percent from the same period of 1983. By comparison, the national average increase was 9.9 percent for the same period.

Consumer prices for 1984 increased 4.1 percent in Honolulu from 1983 as measured by the Honolulu Consumer Price Index (CPI-U). This compares to an increase of just 2.2 percent between 1982 and 1983. At the national level consumer prices rose 4.3 percent from 1983 to 1984.

Figure 3-1

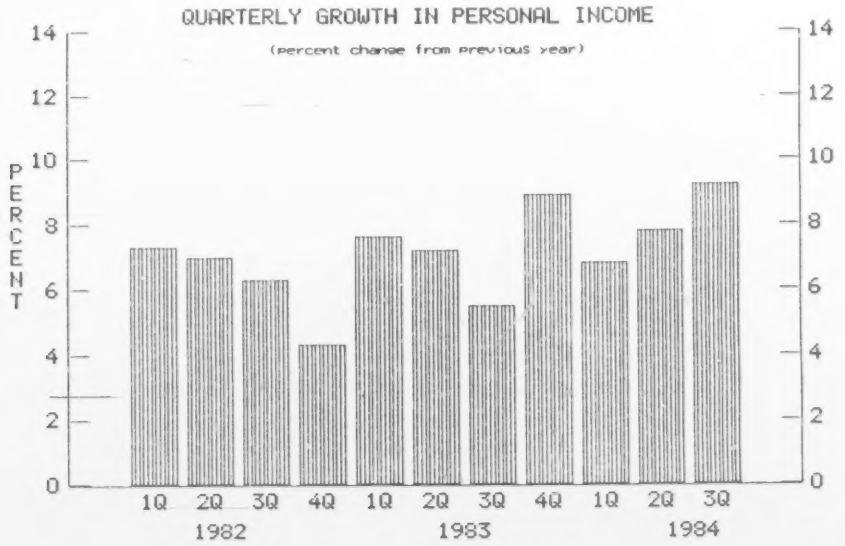


Figure 3-2

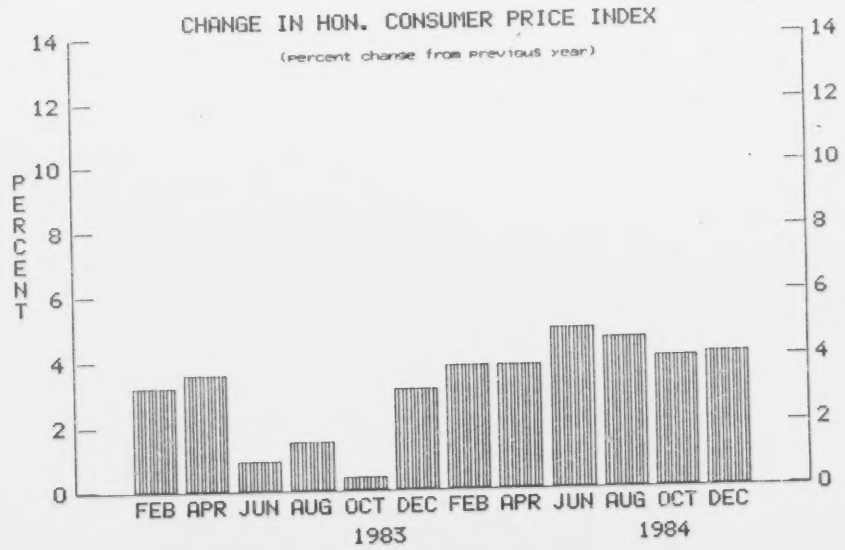


Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII QUARTERLY: 1980 TO 1984

[In millions of dollars]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980 1st Q ..	2,083,913	9,530	11.8	14.2
2nd Q ..	2,110,294	9,596	10.6	12.4
3rd Q ..	2,177,240	9,884	10.3	12.2
4th Q ..	2,255,393	10,232	11.4	13.1
1981 1st Q ..	2,333,319	10,554	12.0	10.7
2nd Q ..	2,380,528	10,729	12.8	11.8
3rd Q ..	2,468,808	11,001	13.4	11.3
4th Q ..	2,497,501	11,230	10.7	9.8
1982 1st Q ..	2,527,108	11,322	8.3	7.3
2nd Q ..	2,560,141	11,485	7.5	7.0
3rd Q ..	2,586,517	11,692	4.8	6.3
4th Q ..	2,629,557	11,710	5.3	4.3
1983 1st Q ..	2,651,491	12,181	4.9	7.6
2nd Q ..	2,704,870	12,314	5.7	7.2
3rd Q ..	2,753,109	12,935	6.4	5.5
4th Q ..	2,825,955	12,755	7.5	8.9
1984 1st Q ..	2,908,890	13,015	9.7	6.8
2nd Q ..	2,970,903	13,273	9.8	7.8
3rd Q ..	3,032,708	13,465	10.2	9.2

1/ Seasonally adjusted, annual rates.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, January 1985.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE UNITED STATES AND HAWAII ANNUALLY: 1970 TO 1983

[In millions of dollars]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970 ..	803,922	3,566	689,190	2,974
1975 ..	1,258,643	5,785	1,090,778	5,000
1980 ..	2,156,710	9,810	1,820,875	8,312
1981 ..	2,420,039	10,878	2,033,294	9,243
1982 ..	2,575,831	11,552	2,172,840	10,025
1983 ..	2,734,122	12,396	2,330,993	10,759
	Percent change from previous year			
1980 ..	11.0	13.0	10.9	12.8
1981 ..	12.2	10.9	11.7	11.2
1982 ..	6.4	6.2	6.9	8.5
1983 ..	6.1	7.3	7.3	7.3

1/ These represent the latest official annual data and may not be completely consistent with more recently published quarterly data.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, August 1984.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS, FOR HONOLULU AND THE U.S. CITY AVERAGE: 1981 TO 1984

[1967=100]

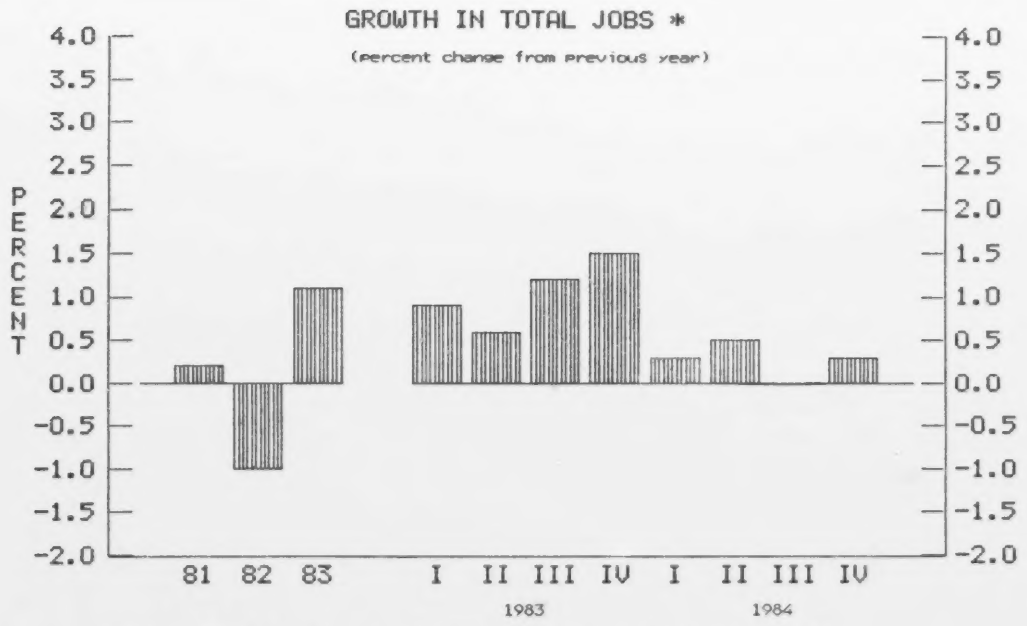
Month and year	All items	Food	Housing	Apparel and upkeep	Trans-portation	Medical care
Honolulu:						
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1983	273.5	306.7	257.5	207.7	253.7	357.6
1984	284.8	(NA)	(NA)	(NA)	(NA)	(NA)
U.S. city avg.:						
1981	272.4	267.3	293.5	186.9	280.0	294.5
1982	289.1	278.2	314.7	191.8	291.5	328.7
1983	298.4	291.7	323.1	196.5	298.4	357.3
1984	311.1	(NA)	(NA)	(NA)	(NA)	(NA)
Honolulu						
1983: October ..	276.4	308.4	260.2	210.0	258.2	362.7
December .	278.4	307.1	264.7	208.8	260.1	363.0
1984: February .	280.7	312.7	264.7	211.0	261.5	372.2
April	283.2	315.6	267.8	208.5	262.9	378.3
June	284.7	319.6	268.0	206.7	266.5	378.8
August ...	286.0	322.7	268.2	199.7	268.7	384.1
October ..	287.4	322.6	271.0	200.1	268.5	384.3
December .	289.8	(NA)	(NA)	(NA)	(NA)	(NA)
U.S. city avg.:						
1983: August ...	300.3	292.2	324.8	197.3	302.4	360.0
October ..	302.6	292.9	326.8	200.7	305.0	362.9
December .	303.5	293.9	327.4	199.3	306.3	366.2
1984: February .	306.6	302.1	331.0	196.2	305.8	373.2
April	308.8	302.3	333.2	199.2	309.6	375.7
June	310.7	302.0	336.2	197.4	313.1	378.0
August ...	313.0	304.8	339.5	200.1	312.9	381.9
October ..	315.3	(NA)	(NA)	(NA)	(NA)	(NA)
December .	315.5	(NA)	(NA)	(NA)	(NA)	(NA)
Percent increase (Honolulu only):						
1981 to 1982 .	6.0	4.5	6.1	4.2	3.4	12.1
1982 to 1983 .	2.2	2.6	1.0	3.1	-0.7	10.3
1983 to 1984 .	4.1	(NA)	(NA)	(NA)	(NA)	(NA)
Oct. 1983 to Oct. 1984 ..	4.0	4.6	4.2	-4.7	4.0	6.0
Dec. 1983 to Dec. 1984 ..	4.1	(NA)	(NA)	(NA)	(NA)	(NA)

NA Not available.
Source: U.S. Department of Labor, Bureau of Labor Statistics.

4. Employment

The total number of jobs in Hawaii increased only 0.3 percent between 1983 and 1984 according to preliminary data. As table 4-2 indicates, reasonably good gains in services and retail trade were offset by significant losses in construction (due to mainly to labor disputes), food processing, real estate, and in agriculture--particularly sugar and pineapple growing. Revised estimates could, however, change this picture significantly. Last year a preliminary estimate of a 0.3 percent decline in jobs between 1982 and 1983 was replaced by an overall, 1.1 percent increase in jobs for the year when final figures were in. Thus, it will be several months before the real extent of job growth in the State for 1984 is finally known.

Figure 4-1



*Total of Non.Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non.Ag. Self employed Persons and Labor Disputes.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1984

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,200	428,550	404,100	24,450	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	440,450	425,100	399,400	25,750	15,250	11,300	3,950	100
1983	445,100	429,900	403,050	26,800	15,100	11,200	3,900	150
1984	446,400	431,300	405,050	26,300	14,600	10,750	3,850	450
1984 (p)								
1st Q ...	444,600	431,100	404,850	26,250	13,300	9,600	3,700	150
2nd Q ...	447,650	433,200	406,400	26,800	14,450	10,900	3,550	0
3rd Q ...	445,450	429,700	403,200	26,500	15,400	11,600	3,800	350
4th Q ...	447,950	431,250	405,700	25,600	15,300	10,950	4,350	1,350
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.4	-1.6	-1.6	5.6	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.4	-3.1	-90.0
1982	-1.0	-0.9	-1.3	6.0	-4.1	-2.5	-9.2	100.0
1983	1.1	1.1	0.9	4.1	-1.0	-0.9	-1.3	50.0
1984	0.3	0.3	0.5	-1.9	-3.3	-3.8	-1.5	211.1
1984 (p)								
1st Q ...	0.3	0.3	0.3	0.5	-2.1	-3.4	1.4	(X)
2nd Q ...	0.5	0.7	0.7	0.1	-2.7	-3.5	-0.9	-100.0
3rd Q ...	-0.0	0.2	0.4	-3.7	-5.0	-5.6	-3.4	0.0
4th Q ...	0.3	0.1	0.5	-4.5	-2.5	-2.2	-3.3	2,600.0

p Preliminary.
x Not calculated -- data in base period equaled zero.
Note: Data rounded to nearest 50 and detail may not add to totals due to rounding.
1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.
Source: Hawaii State Departments of Labor and Industrial Relations, and Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1983 AND 1984

Series	1983	1984 (p)	Percent change from previous year	
			1983	1984 (p)
Total jobs 1/	445,100	446,400	1.1	0.3
Non-agricultural	403,050	495,050	0.9	0.5
Construction	17,950	16,100	-0.4	-10.3
Manufacturing	22,200	21,800	-1.1	-2.0
Food processing	11,150	10,750	-0.7	-3.4
Transp., commun., utilities ...	30,700	31,050	-3.1	1.1
Trade	105,750	108,250	-0.1	2.4
Wholesale	18,150	18,200	-3.9	0.4
Retail	87,600	90,050	0.7	2.8
Finance, insur., & real estate	31,600	31,000	-0.3	-1.8
Services	103,800	105,750	2.7	1.9
Hotels	26,800	27,750	1.2	3.6
Government	91,050	91,100	0.8	0.1
Federal	32,100	32,000	1.9	-0.4
State	45,650	45,900	0.0	0.7
Local	13,300	13,200	1.0	-0.7
Agriculture (wage & salary)	11,200	10,750	-0.9	-3.8
Sugar	4,500	4,300	-4.0	-5.0
Pineapple	2,300	2,100	-6.3	-7.8
Diversified agriculture	4,400	4,350	5.9	-0.7
Non-agricultural self-employed 2/	26,800	26,300	4.1	-1.9
Agricultural self-employed 2/ ...	3,900	3,850	-1.3	-1.5
Labor disputes	150	450	50.0	211.1

p Preliminary.

1/ Total of non-agricultural and agricultural wage and salary, self-employed and jobs involved in labor disputes.

2/ Self-employed includes unpaid family workers and domestics.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1984

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	399,400	325,700	28,700	15,100	29,850
1983	403,050	327,950	29,150	15,500	30,450
1984	405,050	330,200	29,250	15,200	30,400
1984 (p)					
1st Q	404,850	330,050	29,200	15,300	30,250
2nd Q	406,400	331,700	29,050	15,200	30,450
3rd Q	403,200	328,250	29,350	15,250	30,400
4th Q	447,950	330,750	29,450	15,000	30,500
	Percent change from same period in previous year				
1980	2.5	2.2	2.9	6.1	4.0
1981	-0.2	-0.2	1.4	0.6	3.5
1982	-1.3	-2.0	-0.4	-0.7	4.9
1983	0.9	0.7	1.6	2.6	2.0
1984	0.5	0.7	0.4	-2.1	-0.1
1984 (p)					
1st Q	0.3	0.6	-0.1	-0.6	-1.7
2nd Q	0.7	1.1	-0.4	-2.2	-0.2
3rd Q	0.4	0.6	1.2	-3.3	0.1
4th Q	0.3	0.5	0.9	2.0	1.4

p Preliminary.

Note: Data are rounded to nearest 50 and detail may not add to total due to rounding.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1984

[Number of persons]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force:					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	339,550	41,800	20,000	36,650
1981	450,000	345,950	44,300	20,650	39,150
1982	460,000	352,050	45,450	21,300	42,200
1983	473,000	360,050	46,650	22,000	43,300
1984	475,150	363,150	46,750	21,800	43,400
1984					
1st Q	472,300	361,400	46,100	21,800	42,950
2nd Q	478,800	366,400	46,700	21,900	43,750
3rd Q	476,750	363,700	47,100	21,950	44,000
4th Q	472,700	361,150	47,100	21,500	42,900
Civilian employment:					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	323,950	39,200	19,050	34,750
1981	426,000	328,850	40,850	19,450	36,800
1982	430,000	330,550	41,050	19,550	38,850
1983	442,000	339,450	42,400	20,300	39,850
1984	447,400	344,000	42,800	20,150	40,450
1984					
1st Q	446,000	343,800	42,150	20,150	39,900
2nd Q	451,650	347,950	42,550	20,300	40,850
3rd Q	446,850	342,650	43,100	20,150	40,950
4th Q	445,200	341,600	43,350	20,050	40,150

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1984

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons):					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,600	950	1,900
1981	24,000	17,050	3,400	1,200	2,300
1982	31,000	21,500	4,450	1,700	3,350
1983	30,000	20,600	4,250	1,700	3,450
1984	27,700	19,200	4,000	1,600	2,950
1984					
1st Q	26,300	17,600	3,950	1,650	3,100
2nd Q	27,150	18,450	4,200	1,600	2,900
3rd Q	29,900	21,100	4,050	1,800	3,050
4th Q	27,500	19,550	3,750	1,450	2,750
Unemployment rate (percent):					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.2	4.6	5.2
1981	5.4	4.9	7.7	5.9	5.9
1982	6.7	6.1	9.9	8.7	7.9
1983	6.5	5.5	9.1	8.4	7.7
1984	5.8	5.3	8.6	7.3	6.8
1984					
1st Q	5.5	4.9	8.5	6.9	7.1
2nd Q	5.7	5.0	9.0	7.3	6.6
3rd Q	6.3	5.8	8.6	8.1	6.9
4th Q	5.8	5.4	8.0	6.7	6.4

Source: Hawaii State Department of Labor and Industrial Relations.

5. Business Activity & Tax Revenue

Total transactions in the State subject to State excise and use tax increased an estimated 11.0 percent for the first eleven months of 1984 from the comparable 1983 period. Most of the gain was during the first six months of 1984 with the total up 15.9 percent. From July through November of last year (a period marked by prolonged construction work stoppages) total transactions increased 5.2 percent.

For calendar year 1984 tax revenues to the State's General Fund increased 11.8 percent. General excise and use tax collections increased 8.8 percent in 1984 while net individual and corporate income taxes increased 15.6 percent and 41.9 percent respectively.

Figure 5-1

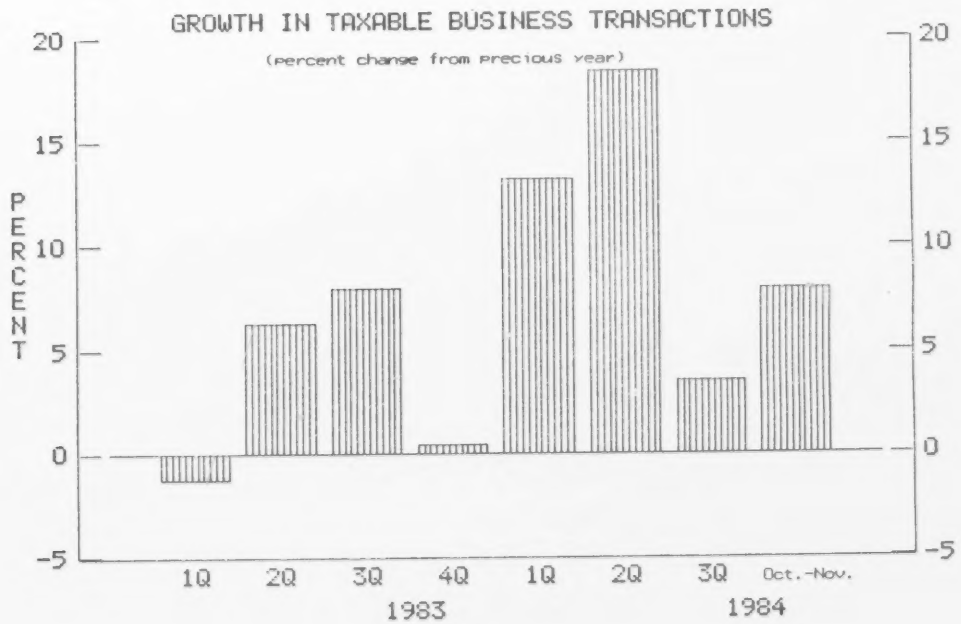


Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1984

[Millions of dollars]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manufacturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1983	21,416.8	7,458.8	2,128.5	858.2	221.6	502.3
1983						
1st Q	5,141.5	1,813.8	498.9	224.3	54.3	109.6
2nd Q	5,514.8	1,907.3	566.7	219.2	58.7	125.3
3rd Q	5,609.6	1,934.2	551.6	224.1	54.4	143.2
4th Q	5,150.9	1,803.5	511.2	190.6	54.2	124.2
1984						
1st Q	5,820.9	1,981.4	554.8	239.6	60.1	126.2
2nd Q	6,528.1	2,181.9	662.2	318.6	69.3	153.4
3rd Q	5,806.5	1,998.7	606.6	237.3	58.7	130.5
Oct-Nov	3,734.8	1,317.6	368.8	138.0	35.7	76.9
	Percent change from same period in previous year					
1983	3.4	5.9	7.7	-2.0	25.3	-7.7
1st Q	-1.3	1.1	2.2	-8.3	8.2	-26.9
2nd Q	6.3	5.2	10.9	2.2	39.6	-5.2
3rd Q	8.0	11.8	15.6	4.1	35.3	12.9
4th Q	0.4	5.7	2.3	-5.3	28.5	5.6
1984						
1st Q	13.2	9.2	11.2	6.8	10.6	15.2
2nd Q	18.4	14.4	16.8	45.4	18.0	22.4
3rd Q	3.5	3.3	10.0	6.1	7.9	-8.9
Oct-Nov	8.0	12.5	10.0	-1.1	1.1	-16.0

Note: This series derived by lagging excise tax base data one month to adjust for reporting delay.

Source: Hawaii State Department of Planning and Economic Development based on raw data from Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1970 TO 1984

[Thousands of dollars]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State general fund 3/
1970	172,289	112,019	13,241	337,216
1975	301,475	178,922	37,310	585,701
1978	392,236	239,587	25,597	749,216
1979	466,535	287,163	37,771	890,434
1980	527,304	335,670	43,912	1,008,750
1981	575,216	349,643	43,594	1,070,895
1982	574,590	296,757	34,785	1,011,465
1983	615,536	358,072	27,960	1,109,876
1984	669,805	413,885	39,682	1,240,352
1984 1st Q	165,120	112,154	9,588	293,272
2nd Q	173,806	81,345	14,681	313,706
3rd Q	165,634	111,966	10,437	317,326
4th Q	165,245	108,421	4,975	316,049
	Percent change from corresponding period in previous year			
1978	11.4	12.9	11.2	11.5
1979	18.9	19.9	47.6	18.8
1980	13.0	16.9	16.3	13.3
1981	9.1	4.2	-0.7	6.1
1982	-0.1	-15.1	-20.2	-5.5
1983	7.1	20.7	-19.6	9.7
1984	8.8	15.6	41.9	11.8
1984 1st Q	6.0	18.9	48.5	9.5
2nd Q	9.0	50.1	57.1	15.9
3rd Q	9.3	3.7	-7.9	7.4
4th Q	11.0	6.6	498.7	14.6

Note: This series represents data as reported by the Department of Taxation, without adjustment.

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

6. The Visitor Industry

The total number of visitors to Hawaii in 1984 increased an impressive 10.6 percent over 1983. Both major directions of visitor travel showed substantial increases with westbound arrivals up 9.1 percent and eastbound arrivals 15.7 percent more than in 1983.

All counties experienced an increase in westbound tourism during 1984 with Kauai experiencing the largest increase at 13.0 percent and the Big Island experiencing the least increase at 2.7 percent. Maui County and Oahu experienced increases of 8.9 percent and 7.5 percent respectively.

The increase in tourism last year helped raise the overall occupancy rate for visitor accommodations in the State to an average 77 percent for January through November compared to an average of about 70 percent in the same period of 1983.

Figure 6-1

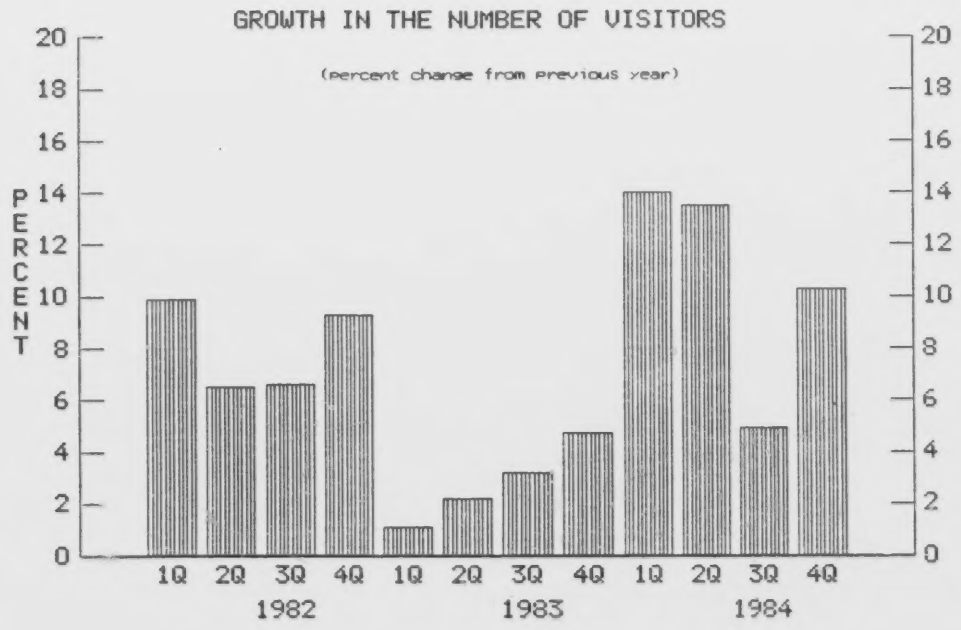


Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1970 TO 1984

Year	Visitors staying overnight or longer			Average number present	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1970	1,746,970	1,326,135	420,835	32,028	36,943
1975	2,829,105	2,207,417	621,688	59,495	66,308
1978	3,670,309	3,030,999	639,310	85,028	92,034
1979	3,960,531	3,139,455	821,076	89,678	98,676
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,449	95,968
1982 (r)	4,242,925	3,278,525	964,400	94,740	105,310
1983 (r)	4,364,980	3,392,980	972,000	97,395	108,045
1984 (p)	4,826,640	3,701,780	1,124,860	(NA)	(NA)
1984 1st Q (p)	1,219,285	957,255	262,030	(NA)	(NA)
2nd Q (p)	1,215,995	925,110	290,885	(NA)	(NA)
3rd Q (p)	1,203,150	905,090	298,060	(NA)	(NA)
4th Q (p)	1,188,210	914,320	273,890	(NA)	(NA)
	Percent change from corresponding period in previous year				
1978	6.9	9.7	-4.6	12.3	10.8
1979	7.9	3.6	28.4	5.5	7.2
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.9	8.6
1983 (r).....	2.9	3.5	0.8	2.8	2.6
1984 (p)	10.6	9.1	15.7	(NA)	(NA)
1984 1st Q (p)	14.0	13.3	16.7	-	-
2nd Q (p)	13.5	11.7	19.5	-	-
3rd Q (p)	4.9	1.2	18.1	-	-
4th Q (p)	10.3	10.7	8.8	-	-

r Revised and rounded to the nearest five.
p Preliminary.
NA Not available.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS BY COUNTY: 1981 TO 1984

Year 1/	City and County of Honolulu	Hawaii County	Maui County	Kauai County
1981	2,398,477	672,683	1,389,892	757,811
1982 (r)	2,723,435	678,170	1,550,080	733,295
1983 (r)	2,688,110	737,180	1,698,630	713,930
1984 (p)	2,888,490	756,890	1,849,800	806,620
1983: 1st Q (r)	657,570	198,595	427,885	157,400
2nd Q (r)	671,095	168,105	406,750	176,915
3rd Q (r)	722,365	183,920	443,435	202,015
4th Q (r)	637,080	186,560	420,560	177,600
1984: 1st Q (p)	729,250	214,810	490,605	204,730
2nd Q (p)	723,450	178,745	467,715	201,995
3rd Q (p)	725,430	180,735	448,230	200,860
4th Q (p)	710,360	182,600	443,250	199,030
	Percent change from corresponding period in previous year			
1981	(NA)	(NA)	(NA)	(NA)
1982 (r)	13.5	0.8	11.5	-3.2
1983 (r)	-1.3	8.7	9.6	-2.6
1984 (p)	7.5	2.7	8.9	13.0
1983: 1st Q (r)	-2.1	10.9	2.8	-17.0
2nd Q (r)	0.7	2.7	5.7	-10.6
3rd Q (r)	-0.9	3.3	9.8	-2.5
4th Q (r)	-1.5	0.3	2.8	7.9
1984: 1st Q (p)	10.9	8.2	14.7	30.1
2nd Q (p)	7.8	6.3	15.0	14.2
3rd Q (p)	0.4	-1.7	1.1	-0.1
4th Q (p)	11.5	-2.1	5.4	12.1

r Revised and rounded to the nearest five.
p Preliminary.
NA Not available.
1/ Data prior to 1981 are not comparable to later figures due to revisions.
Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1984

[Percent; survey does not include some large hotel chains]

Date	State	Waikiki	Hawaii County	Kauai County	Maui County
Annual average:					
1970	71.2	74.1	68.3	58.0	66.7
1975	74.1	78.3	59.9	77.2	72.3
1978	79.5	82.1	65.0	83.3	80.4
1979	73.8	77.1	62.0	76.5	73.0
1980	69.3	71.7	52.7	69.6	66.2
1981	68.2	73.9	44.9	62.7	70.3
1982	70.4	77.7	44.0	57.5	73.9
1983	69.7	76.6	44.7	57.2	75.2
1984 (Jan-Nov) .	77.3	84.7 1/	55.8	63.7	81.9
1983					
January	63.4	70.3	41.8	43.8	65.7
February	80.8	90.3	54.9	63.3	88.7
March	79.9	87.9	49.7	57.6	88.1
April	65.3	71.2	40.8	47.8	72.9
May	63.3	69.6	36.9	55.0	69.8
June	74.6	81.6	43.7	66.1	79.1
July	73.3	81.9	45.1	64.0	73.5
August	75.3	80.2	49.9	66.8	83.1
September	66.1	71.9	40.7	62.5	68.7
October	65.7	70.9	51.0	61.1	77.3
November	64.9	69.4	45.3	51.8	73.0
December	66.1	74.5	38.8	45.9	64.2
1984					
January	74.9	84.2	51.3	48.8	77.1
February	89.3	94.3	72.4	74.5	91.9
March	88.1	92.0	68.1	78.1	90.8
April	75.9	80.0	52.1	61.0	88.8
May	72.9	76.1	50.8	62.9	82.1
June	77.8	85.3	50.2	66.5	77.9
July	75.1	81.1	53.8	58.0	78.7
August	78.8	(NA)	54.5	66.0	84.0
September	70.0	(NA)	51.1	59.6	69.8
October	75.8	(NA)	59.1	65.6	83.1
November	77.1	(NA)	60.7	60.5	80.1

NA Not available.
1/ January through July.
Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company.

Table 6-4.-- EXISTING HOTEL UNITS, BY GEOGRAPHIC AREAS: 1970 TO 1984

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110
1984	62,448	36,848	32,239	7,149	5,313	13,138

Source: Hawaii Visitors Bureau.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES, BY ISLANDS: 1970 TO 1984

[Dollars]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	(NA)	(NA)	(NA)	(NA)
1975	29.75	(NA)	(NA)	(NA)	(NA)
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
1983	54.78	46.93	48.84	81.60	59.78
1984 (Jan-Nov)	58.96	49.20	57.54	88.31	64.90
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983	5.6	4.6	3.4	8.8	2.2
1984 (Jan-Nov)	6.3	3.5	14.3	8.8	9.3

NA Not available.

Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

7. Construction

The value of construction completed in Hawaii during the first nine months of 1984 declined 2.5 percent from the value recorded in the same 1983 period, based on State excise and use tax data. Construction activity in 1984 had been showing modest gains over 1983 (in current dollars) until the third quarter when strikes affecting concrete production, carpentry, and electrical work, resulted in a 13 percent decline in construction value that quarter compared to the same 1983 period. The total number of construction jobs declined almost 11 percent in the third quarter of 1984 compared to a year earlier. DPED estimates that for all of 1984 the labor disputes caused a loss of $120 million in construction work and $40 million in personal income in the State's economy.

Figure 7-1

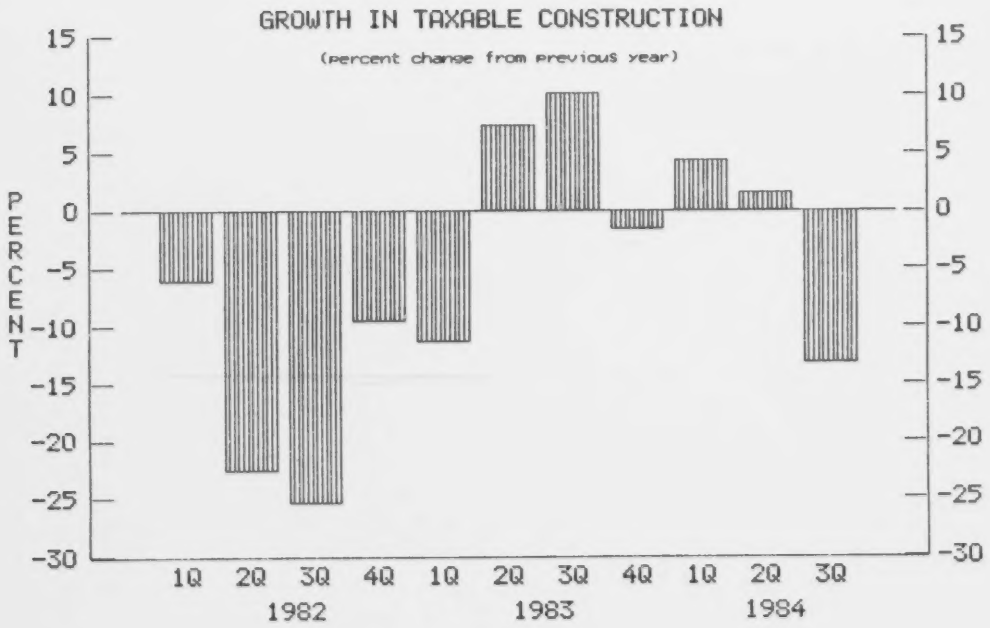


Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1984

[Millions of dollars]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1980	1,569.7	1,219.2	680.2	331.5	207.5	230.6
1981	1,584.7	802.0	398.3	240.8	162.9	427.5
1982	1,323.9	683.1	299.2	242.9	141.1	392.7
1983	1,334.2	685.2	296.2	203.2	185.9	277.9
1984 1st Q ...	332.1	145.8	75.5	32.3	38.0	65.9
2nd Q ...	365.0	154.4	89.7	29.8	34.9	124.8
3rd Q ...	297.1	136.0	73.0	24.2	38.9	84.1
	Percent change from corresponding period in previous year					
1980	16.9	39.3	27.1	53.8	67.2	-40.7
1981	1.0	-34.2	-41.4	-27.4	-21.5	85.4
1982	-16.5	-14.8	-24.9	0.9	-13.4	-8.1
1983	0.8	0.3	-1.0	-16.3	31.8	-29.3
1984 1st Q ...	4.3	24.3	31.4	75.1	-8.2	-33.0
2nd Q ...	1.5	-1.6	34.1	-11.8	-38.0	427.0
3rd Q ...	-13.2	-35.7	-38.1	-49.3	-15.1	17.5

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1984

[Millions of dollars]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1983	685.2	366.8	86.7	140.5	91.3
1984 1st Q ...	145.8	90.1	23.6	16.2	15.9
2nd Q ...	154.4	110.7	18.3	11.4	14.0
3rd Q ...	136.0	83.0	21.5	14.8	16.7
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1983	0.3	-22.4	15.3	217.5	0.6
1984 1st Q ...	24.3	37.8	25.5	-24.3	34.7
2nd Q ...	-1.6	37.7	-17.6	-69.8	-15.1
3rd Q ...	-35.7	-40.4	-14.0	-53.7	9.4

NA Not available.
Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED BY AWARDING AGENCY: 1970 TO 1984

[Millions of dollars]

Year	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1983	277.9	84.7	126.8	66.4
1984	411.8	130.0	196.7	85.1
1984				
1st Q	65.9	8.7	38.9	18.3
2nd Q	124.8	33.2	78.0	13.6
3rd Q	84.1	5.9	58.4	19.8
4th Q	136.9	82.2	21.3	33.3
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1983	-29.3	-39.3	-30.3	-6.7
1984	48.2	53.4	55.1	28.2
1984				
1st Q	-33.0	-25.7	-27.4	-44.7
2nd Q	526.0	478.3	828.5	42.3
3rd Q	17.5	-65.4	58.0	11.8
4th Q	62.6	63.1	-23.1	455.0

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED, BY COUNTY: 1970 TO 1984

[Includes duplexes]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1976	3,383	1,384	821	297	881
1977	4,891	2,281	1,074	445	1,091
1978	5,219	2,270	1,382	567	1,000
1979	6,181	3,156	1,445	556	1,024
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1983	3,417	1,627	938	291	561
1984 1st Q	1,092	651	224	70	147
2nd Q	1,160	654	252	96	158
3rd Q	1,115	568	250	111	186
	Percent change from corresponding period in previous year				
1978	6.7	0.5	28.7	27.4	-8.3
1979	18.4	39.0	4.6	-1.9	2.4
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1983	49.5	124.4	17.3	26.5	5.8
1984 1st Q	21.9	38.2	-7.4	22.8	16.7
2nd Q	21.8	30.3	18.9	31.5	-4.2
3rd Q	29.4	43.4	4.2	38.8	27.4

Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED, BY COUNTY: 1970 TO 1984

[Three or more units per structure]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1976	3,751	3,397	129	4	221
1977	3,129	2,389	129	83	528
1978	4,236	1,968	334	610	1,324
1979	6,351	1,804	718	1,125	2,704
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1983	1,341	1,220	38	73	10
1984 1st Q	61	22	4	35	0
2nd Q	444	444	0	0	0
3rd Q	134	81	49	0	4
	Percent change from corresponding period in previous year				
1978	39.1	-1.8	158.9	(X)	150.8
1979	49.9	-8.3	115.0	84.4	104.2
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1983	-70.8	-70.3	-84.5	-38.1	-91.8
1984 1st Q	454.5	(X)	-63.6	(X)	(X)
2nd Q	264.3	298.0	(X)	-100.0	-100.0
3rd Q	-87.3	-91.6	81.5	-100.0	(X)

X Not calculated -- data in base period equaled zero.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1984

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1976	21,400	36.2	19,350	5,650	22.6	8.80
1977	19,750	35.7	17,650	4,150	19.1	9.87
1978	20,650	36.6	18,900	2,500	11.7	10.53
1979	23,400	36.0	21,050	1,700	7.5	11.05
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	21,900	36.2	19,800	3,500	15.0	13.13
1982	17,850	35.8	16,000	4,000	20.0	14.50
1983	17,950	37.2	16,700	2,850	14.6	15.80
1984 1st Q ..	17,450	38.1	16,600	(NA)	(NA)	16.36
2nd Q ..	16,850	35.8	15,100	(NA)	(NA)	16.51
3rd Q ..	16,000	37.6	15,050	(NA)	(NA)	16.43
	Percent change from corresponding period in previous year					
1978	4.6	2.5	7.1	-39.8	(X)	6.7
1979	13.3	-1.6	11.4	-32.0	(X)	4.9
1980	2.4	0.6	3.1	55.9	(X)	7.2
1981	8.6	0.0	-7.1	32.1	(X)	11.2
1982	-18.5	-1.1	-19.2	14.3	(X)	9.4
1983	0.6	3.9	4.4	-28.7	(X)	9.0
1984 1st Q ..	-3.6	-1.3	-4.9	(NA)	(X)	5.3
2nd Q ..	-5.6	-4.8	-12.0	(NA)	(X)	5.6
3rd Q ..	-10.6	-1.1	-11.5	(NA)	(X)	3.9

NA Not available.
X Not applicable.
1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.
2/ Equivalent number of jobs if all workers had worked a 40-hour week.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1984

[1967=100]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1979	266.2	248.3	288.8	264.3	237.6	287.5
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1983	331.5	276.5	400.9	352.1	294.6	402.0
1984	347.7	281.4	431.3	366.9	294.6	430.2
1984						
March ..	348.0	283.0	430.0	367.4	296.0	429.3
June ...	347.4	280.4	430.4	367.1	294.1	430.4
Sept. ..	350.8	281.7	438.0	367.2	293.7	436.6
Dec. ...	349.1	278.7	438.0	369.2	291.6	436.6
	Percent change from corresponding period in previous year					
1979	9.4	13.5	5.2	9.5	16.1	5.3
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1983	8.8	10.3	7.5	6.6	4.7	7.8
1984	4.9	1.8	7.8	4.2	0.0	7.0
1984						
March ..	7.4	5.7	8.9	5.4	1.2	8.0
June ...	3.2	-2.9	8.4	4.4	-0.1	8.0
Sept. ..	3.7	-0.3	7.1	3.8	-0.1	6.9
Dec. ...	2.7	-1.4	6.3	2.8	-1.8	5.7

1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

8. Major Sources of Income

The value of defense expenditures in Hawaii for the first nine months of 1984 was unchanged from the same period in 1983. The lack of growth for most of 1984 was primarily due to a 12.8 percent decline in the local purchase of goods and services by the Armed Forces for the first nine months of last year. On the other hand, military and civilian pay for the first nine months increased 5.7 and 3.9 percent respectively.

A large movement of canned pineapple from inventories to the market early in 1984, has resulted in a 24.2 percent increase in the value of canned pineapple shipments for the first nine months of 1984 as measured by State excise and use tax data. Shipments of raw sugar declined 1.9 percent in terms of taxable value for the first nine months of 1984.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1983

[Millions of dollars]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1971	705	708.8	202.9	141.4
1972	840	744.2	184.7	145.4
1973	1,020	840.9	222.2	142.4
1974	1,225	897.9	676.6	127.1
1975	1,360	982.9	366.1	136.7
1976	1,640	1,034.2	257.0	144.5
1977	1,845	1,086.6	226.8	161.6
1978	2,146	1,155.5	285.2	162.9
1979	2,537	1,221.7	345.7	206.4
1980	2,875	1,317.4	594.1	226.5
1981	3,200	1,449.3	327.9	217.6
1982	3,700	1,693.4	351.5	206.0
1983	4,000	1,848.2	410.2	219.0

1/ Includes value of molasses.

Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaiian Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1984

[Millions of dollars]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1983	1,848.2	935.9	702.7	182.6	27.0
1984					
1st Q	461.2	237.5	163.2	54.0	6.6
2nd Q	463.5	236.0	169.5	51.3	6.6
3rd Q	459.7	236.9	165.8	50.9	6.1
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1983	9.1	6.6	14.9	5.1	-9.7
1984					
1st Q	-1.5	2.9	-12.9	23.3	0.4
2nd Q	2.3	-0.7	3.9	12.8	-5.6
3rd Q	-0.8	3.0	-7.0	6.3	-14.8

Note: Data include all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1984

Year	Value of shipments 1/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 2/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1983	421.5	174.2	25.3	-8.0
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	43.1	47.4	49.1
1983				
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
3rd Q	136.2	50.9	35.4	-19.3
4th Q	79.4	50.3	-13.7	16.7
1984				
1st Q	90.1	53.6	-14.9	64.4
2nd Q	114.4	47.8	14.5	18.3
3rd Q	131.0	52.5	-3.8	3.0

NA Not available.

Note: These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 8-1, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

1/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

2/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- RECENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period 2/	Number	Percent change	
				From preceding period	From same period in previous year
Resident population					
State	Persons	July 1	1,038,700	-	2.0
City and County of Honolulu (p)	Persons	July 1	803,000	-	1.7
Hawaii County (p)	Persons	July 1	107,800	-	1.9
Kauai County (p)	Persons	July 1	44,600	-	3.3
Maui County (p) 3/	Persons	July 1	83,300	-	4.6
Income					
Total personal income 4/	$ Million	2nd Quarter	13,273	2.0	7.8
Consumer price index (Honolulu)					
All items	(1967=100)	October	287.4	0.5 5/	4.0
Food prices	(1967=100)	October	322.6	0.0 5/	4.6
Construction					
Total private permits	$ Million	3rd Quarter	136.0	-11.9	-35.7
Total residential permits	$ Million	3rd Quarter	73.0	-18.6	-38.1
New single-family units	Number	3rd Quarter	1,115	3.9	29.4
New multi-family units	Number	3rd Quarter	134	-69.8	-87.3
Government contracts awarded	$ Million	3rd Quarter	84.1	32.6	17.5
Construction cost indexes (Hon.)					
Single family	(1967=100)		347.7	-	4.9
High-rise buildings	(1967=100)		366.9	-	4.2
Employment (p)					
Total civilian labor force	Persons		475,100	-	0.4
Civilian employment	Persons		447,400	-	1.2
Civilian unemployment	Persons		27,700	-	-7.7
Unemployment rate	Percent		5.8	-	-
Total jobs	Number		446,400	-	0.3
Visitor industry					
Total visitors	Number		4,826,640	-	10.7
Westbound	Number		3,701,780	-	9.1
Eastbound	Number		1,124,860	-	15.7
Visitor expenditures	$ Million	1983	4,000	-	8.1
Hotel units	Number	February	62,448	-	6.3
Defense expenditures	$ Million	1983	1,848.2	-	-1.5
Sugar production	$ Million	1983	410.2	-	16.7
Pineapple sales	$ Million	1983	219.0	-	6.3

p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ 1984 data unless indicated otherwise.
3/ Includes Kalawao County.
4/ Seasonally adjusted at annual rate.
5/ From August.

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HAWAII

ECONOMIC RESEARCH REPORTS

RESEARCH AND ECONOMIC ANALYSIS DIVISION

DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

Second Quarter 1985

QUARTERLY STATISTICAL AND ECONOMIC REPORT - STATE OF HAWAII

Second Quarter 1985

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore, Karen Yamashita, Tu Pham, and Sharon Nishi.

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1. The Economy -- Recent Trends

The potential loss to Hawaii of $348 million in direct visitor expenditures during 1985 was averted when United Airlines and its striking pilots came to terms after a month-long strike in May and June. While the settlement means that the airline will soon be back to its pre-strike, 21 flights per day to the islands, it is unclear how many anticipated visitors in 1985 have irreversibly changed their vacation plans for this year.

Nationally, a sluggish, 0.3 percent annual rate of growth in gross national product (GNP) during the first quarter of 1985 raised concern about how much longer the U.S. economic recovery (now in its third year) can be maintained. Though most national economic forecasts do not view the first quarter slowdown as an indication that another recession is imminent, the outlook is decidedly more cautious than earlier in the year.

The United Airlines Pilots Strike

The strike by United Airlines pilots, which began on May 17, had threatened to cripple the State's visitor industry before a settlement was reached on June 14. During the strike, United Airlines' Mainland to Hawaii schedule declined from an average of about 21 flights per day serving the four counties to just two flights per day into Honolulu airport only. A Governor's task force on the strike, headed by Lt. Governor John Waihee, had asked the U.S. Department of Transportation to allow foreign air carriers to transport passengers between the Mainland and Hawaii to help reduce the economic impact of the strike. 1/ While the issue became moot when the strike was settled, the apparent answer from the Transportation Department was no, at least for a blanket exemption for all types of passengers.

In an effort to show what the potential economic effect on the State might be if the United strike was prolonged, DPED, in conjunction with the Research Department of First Hawaiian Bank, prepared the task force's official economic impact estimates. Those estimates (Tables 1-1 to 1-4) illustrate the extent of the State's potential losses if the strike were to have lasted longer than the one month that actually occurred.

In a hypothetical "maximum impact" situation, in which the strike were to last through the end of the year, the State stood to lose $348 million in direct visitor revenues, $626 million in total sales of goods and services throughout the economy, and a potential, temporary loss of 20,000 jobs (on the average) during the period of the strike (table 1-2). The maximum impact assumed that United Airlines would be limited to three flights per day for the remainder of 1985 and that other domestic airlines would be able to add a total of three extra flights per day to and from the State, in addition to absorbing a portion of the unaccommodated United passengers on their normal flight schedules.

1/ The term commonly used to describe this privilege is "cabotage" (from the French "caboter" -- to sail along the coast), and refers to trade or transport between two points within a country.

An alternative "minimum" impact assumed that United would gradually increase its capacity to about 68 percent by the end of the year (tables 1-3 and 1-4). Even under this more optimistic assumption, the State would have lost $223 million in direct visitor expenditures, a total of $400 million in foregone sales of goods and services, and an average 12,800 jobs would have been "at risk" during the strike. (Those are the jobs supported directly or indirectly by the $223 million in direct visitor expenditures lost.)

Had the strike continued and foreign air carriers been allowed to participate in carrying passengers between the Mainland and Hawaii, a significant amount of otherwise lost visitor business may have been saved. A survey by the Hawaii Visitors Bureau indicated that 1,800 seats per week would have been allocated by foreign carriers to Hawaii bound, Mainland travelers. An analysis of foreign airline capacity by DPED indicated as many as 4,200 seats per week may have been available. Even the lower of these two estimates could have reduced the total loss of visitor expenditures through the end of the year by $49 million. The higher estimate would have saved $112 million in visitor expenditures or about one-third of the expected loss of visitor expenditures through December under the "maximum" impact assumption of table 1-1 and 1-2.

With the strike over and United Airlines building back to full strength, the most important question is the extent of damage to the State's economy because of the strike. Outside of tourism, the overall economic impact appears to have been minimal, although some agricultural operations were affected.

The impact of the strike on the visitor industry had both immediate and potential future effects. For the month-long period of the strike and the period of phasing in a full flight schedule, the visitor industry may have lost as much as $76 million in direct visitor expenditures (assuming full strength was not achieved until the first week of July). This estimate is based on the loss indicated in table 1-1 for the first month plus a portion of the second strike month. A much more accurate estimate will be possible when actual visitor survey statistics are available for the entire strike period. Because the strike was settled within a month, it is unlikely that many of the roughly 24,000 employees whose jobs were at risk were actually laid-off, although work hours were undoubtedly reduced in various industries due to the drop in the visitor count. Had the strike exceeded one month, lay-offs may have mounted rapidly. Again, a more definitive assessment of impacts will only be possible later, when actual data become available.

For the immediate future -- at least through the remainder of the peak summer season -- the question is how many planned Hawaii vacations have been permanently cancelled due to the uncertainty of transportation. Hopefully, with the relatively short duration of the strike, the intense efforts of the Hawaii Visitors Bureau to communicate with travel agents, and added incentives for travel by United Airlines following the strike, the cancellation of Hawaii vacations in the July-August period will be minimized. Only time will tell.

Table 1-1.-- MONTH BY MONTH MAXIMUM IMPACT. HYPOTHETICAL ECONOMIC IMPACT OF THE UNITED AIRLINES STRIKE ON HAWAII ASSUMING LIMITED LEVEL OF UNITED AIRLINES SERVICE: MAY 17 TO DECEMBER 31, 1985

Impact factor	Period							
	First month: May 17 to June 16	Second month: June 17 to July 16	Third month: July 17 to August 16	Fourth month: Aug. 17 to Sept. 16	Fifth month: Sept. 17 to Oct. 16	Sixth month: Oct. 17 to Nov. 16	Seventh month: Nov. 17 to Dec. 16	December 17 to 31
Expected overnight-westbound visitors before strike 1/	336,700	348,300	356,400	311,800	292,300	317,100	331,300	176,700
Estimated percent of visitors lost due to strike 2/	16%	19%	21%	16%	10%	10%	10%	11%
Estimated number of visitors lost due to strike	54,200	67,600	73,800	48,600	28,100	31,700	32,500	18,700
Average loss per day	1,750	2,250	2,380	1,570	940	1,020	1,080	1,250
Estimated loss of direct visitor expenditures	$55.5 mil.	$69.7 mil.	$74.6 mil.	$46.8 mil.	$26.5 mil.	$28.9 mil.	$29.2 mil.	$17.2 mil.
Average loss per day	$1.8 mil.	$2.3 mil.	$2.4 mil.	$1.5 mil.	$0.8 mil.	$0.9 mil.	$1.0 mil.	$1.1 mil.
Potential loss of total sales of goods and services in the economy	$99.7 mil.	$125.2 mil.	$134.0 mil.	$84.1 mil.	$47.6 mil.	$51.9 mil.	$52.4 mil.	$30.9 mil.
Estimated average number of jobs at risk: 3/								
Total	23,830	29,930	32,030	20,100	11,380	12,410	12,540	7,390
Direct 4/	13,290	16,690	17,860	11,210	6,340	6,910	6,990	4,120
Other 5/	10,540	13,240	14,170	8,890	5,040	5,490	5,550	3,270
Potential loss of household income 6/	$36.8 mil.	$46.2 mil.	$49.5 mil.	$31.0 mil.	$17.6 mil.	$19.2 mil.	$19.4 mil.	$11.4 mil.
Potential loss of State and local government tax revenues	$6.4 mil.	$8.0 mil.	$8.6 mil.	$5.4 mil.	$3.1 mil.	$3.3 mil.	$3.4 mil.	$2.0 mil.

mil. Million.

1/ Based on an expected 6 percent average increase in overnight visitors for 1985.

2/ Developed by analyzing confidential data provided by the State Department of Transportation to estimate the number of anticipated United Airlines passengers to Hawaii who would not be accommodated on other domestic carriers. This figure takes into account three flights per day by United and an additional three flights per day by other domestic carriers. All flights were assumed to be running at a 95 percent load factor during the hypothetical strike period.

3/ These are the average numbers of jobs supported by the hypothetical loss in visitor expenditures based on the DPED Inter-Industry (Input-Output) Model. It is not anticipated that all of these jobs would have been lost immediately, but rather gradually as the strike continued. This is because many employers would likely have "carried" employees as long as possible, cut hours of work, or encouraged employees to take vacation before laying workers off.

4/ Direct jobs are those supported by the direct expenditures of visitors.

5/ Other jobs are those supported by the respending of visitor dollars in the economy over time.

6/ As in footnote three, this total amount may have been lost initially but as the strike continued, a higher proportion of the potential income loss per month would have been experienced.

Source: Department of Planning and Economic Development, Research and Economic Analysis Division, for the Governor's task force on the United Airlines strike, June 7, 1985.

Table 1-2.-- CUMULATIVE MAXIMUM IMPACT. HYPOTHETICAL ECONOMIC IMPACT OF THE UNITED AIRLINES STRIKE ON HAWAII ASSUMING LIMITED LEVEL OF UNITED AIRLINES SERVICE: MAY 17 TO DECEMBER 31, 1985

Impact factor	Period							
	First month: May 17 to June 16	Second month June 17 to July 16	Third month: July 17 to August 16	Fourth month: Aug. 17 to Sept. 16	Fifth month: Sept. 17 to Oct. 16	Sixth month: Oct. 17 to Nov. 16	Seventh month: Nov. 17 to Dec. 16	December 17 to 31
Expected overnight-westbound visitors before strike 1/	336,700	685,000	1,041,400	1,353,200	1,645,400	1,962,543	2,293,846	2,470,525
Estimated percent of visitors lost due to strike 2/	16%	18%	19%	18%	17%	15%	15%	14%
Estimated number of visitors lost due to strike	54,200	121,800	195,600	244,200	272,300	304,000	336,500	355,200
Average loss per day	1,750	2,000	2,130	1,990	1,780	1,650	1,570	1,550
Estimated loss of direct visitor expenditures	$55.5 mil.	$125.2 mil.	$199.8 mil.	$246.6 mil.	$273.1 mil.	$302.0 mil.	$331.2 mil.	$348.4 mil.
Average loss per day	$1.8 mil.	$2.1 mil.	$2.2 mil.	$2.0 mil.	$1.8 mil.	$1.6 mil.	$1.5 mil.	$1.5 mil.
Potential loss of total sales of goods and services in the economy	$99.7 mil.	$224.9 mil.	$358.8 mil.	$442.9 mil.	$490.5 mil.	$542.4 mil.	$594.8 mil.	$625.7 mil.
Estimated average number of jobs at risk: 3/								
Total	23,830	26,880	28,600	26,470	23,450	21,610	20,317	19,950
Direct 4/	13,290	14,990	15,940	14,760	13,070	12,050	11,320	11,120
Other 5/	10,540	11,890	12,660	11,710	10,380	9,560	8,990	8,830
Potential loss of household income 6/	$36.8 mil.	$83.0 mil.	$132.5 mil.	$163.5 mil.	$181.1 mil.	$200.2 mil.	$219.6 mil.	$231.0 mil.
Potential loss of State and local government tax revenues	$6.4 mil.	$14.4 mil.	$23.0 mil.	$28.4 mil.	$31.5 mil.	$34.8 mil.	$38.2 mil.	$40.2 mil.

mil. Million.

1/ Based on an expected 6 percent average increase in overnight visitors for 1985.

2/ Developed by analyzing confidential data provided by the State Department of Transportation to estimate the number of anticipated United Airlines passengers to Hawaii who would not be accommodated on other domestic carriers.

3/ These are the average numbers of jobs supported by the estimated loss in visitor expenditures based on the DPED Inter-Industry (Input-Output) Model. It is not anticipated that all of these jobs would have been lost immediately, but rather gradually as the strike continued. This is because many employers would likely "carry" employees as long as possible, cut hours of work, or encourage employees to take vacation before laying workers off.

4/ Direct jobs are those supported by the direct expenditures of visitors.

5/ Other jobs are those supported by the respending of visitor dollars in the economy over time.

6/ As in footnote three, this total amount may not have been lost initially but as the strike continued, a higher proportion of the potential income loss per month would have been experienced.

Source: Department of Planning and Economic Development, Research and Economic Analysis Division, for the Governor's task force on the United Airlines strike, June 7, 1985 (revised).

TABLE 1-3. MONTH BY MONTH MINIMUM IMPACT. HYPOTHETICAL ECONOMIC IMPACT OF THE UNITED AIRLINES STRIKE ON HAWAII IN 1985 ASSUMING UNITED AIRLINES BUILT TO 100 PERCENT CAPACITY BY MARCH 31, 1986

Impact factor	Period							
	First month: May 17 to June 16	Second month: June 17 to July 16	Third month: July 17 to August 16	Fourth month: Aug. 17 to Sept. 16	Fifth month: Sept. 17 to Oct. 16	Sixth month: Oct. 17 to Nov. 16	Seventh month: Nov. 17 to Dec. 16	December 17 to 31
Expected overnight-westbound visitors before strike 1/	336,700	348,300	356,400	311,800	292,300	317,100	331,300	176,700
Projected United capacity 2/	13%	17%	26%	35%	44%	54%	63%	68%
Estimated percent of visitors lost due to strike 3/	16%	19%	18%	10%	0.4%	0	0	0
Estimated number of visitors lost due to strike	54,200	67,600	65,200	31,800	1,170	0	0	0
Average loss per day	1,750	2,250	2,100	1,030	40	0	0	0
Estimated loss of direct visitor expenditures	$55.5 mil.	$69.7 mil.	$65.9 mil.	$30.6 mil.	$1.1 mil.	0	0	0
Average loss per day	$1.8 mil.	$2.3 mil.	$2.1 mil.	$1.0 mil.	$0.04 mil.	0	0	0
Potential loss of total sales of goods and services in the economy	$99.7 mil.	$125.2 mil.	$118.4 mil.	$55.0 mil.	$2.0 mil.	0	0	0
Estimated average number of jobs at risk: 4/								
Total	23,830	29,930	28,300	13,140	470	0	0	0
Direct 5/	13,290	16,690	15,780	7,330	260	0	0	0
Other 6/	10,540	13,240	12,520	5,810	210	0	0	0
Potential loss of household income 7/	$36.8 mil.	$46.2 mil.	$43.7 mil.	$20.3 mil.	$0.7 mil.	0	0	0
Potential loss of State and local government tax revenues	$6.4 mil.	$8.0 mil.	$7.6 mil.	$3.5 mil.	$0.1 mil.	0	0	0

mil. Million.

1/ Based on an expected 6 percent average increase in overnight visitors for 1985.

2/ United's capacity to carry passengers in the first two months of the strike would not have changed from the estimates underlying table 1a -- the maximum impact. From the second month through the end of the year, it is assumed here that United's capacity would have risen proportionately through the end of the year to their projected 100 percent capacity by March 31, 1985 (linear interpolation).

3/ Developed by analyzing confidential data provided by the State Department of Transportation to estimate the number of anticipated United Airlines passengers to Hawaii who would not be accommodated on other domestic carriers.

4/ These are the average numbers of jobs supported by the estimated loss in visitor expenditures based on the DPED Inter-Industry (Input-Output) Model. It is not anticipated that all of these jobs would have been lost immediately, but rather gradually as the strike continued. This is because many employers would likely "carry" employees as long as possible, cut hours of work, or encourage employees to take vacation before laying workers off.

5/ Direct jobs are those supported by the direct expenditures of visitors.

6/ Other jobs are those supported by the respending of visitor dollars in the economy over time.

7/ As in footnote four, this total amount may not have been lost initially but as the strike continued, a higher proportion of the potential income loss per month would have been experienced.

Source: Department of Planning and Economic Development, Research and Economic Analysis Division, for the Governor's task force on the United Airlines strike, June 7, 1985.

Table 1-4.-- CUMULATIVE MINIMUM IMPACT. HYPOTHETICAL ECONOMIC IMPACT OF THE UNITED AIRLINES STRIKE ON HAWAII IN 1985 ASSUMING UNITED AIRLINES BUILT TO 100 PERCENT CAPACITY BY MARCH 31, 1986

Impact factor	Period							
	First month: May 17 to June 16	Second month June 17 to July 16	Third month: July 17 to August 16	Fourth month: Aug. 17 to Sept. 16	Fifth month: Sept. 17 to Oct. 16	Sixth month: Oct. 17 to Nov. 16	Seventh month: Nov. 17 to Dec. 16	December 17 to 31
Expected overnight-westbound visitors before strike 1/	336,700	685,000	1,041,400	1,353,200	1,645,400	1,962,500	2,293,800	2,470,500
Estimated percent of visitors lost due to strike 2/	16%	18%	18%	16%	13%	11%	10%	9%
Estimated number of visitors lost due to strike	54,200	121,800	187,000	218,800	220,000	220,000	220,000	220,000
Average loss per day	1,750	2,000	2,030	1,780	1,430	1,200	1,020	1,000
Estimated loss of direct visitor expenditures	$55.5 mil.	$125.2 mil.	$191.1 mil.	$221.7 mil.	$222.8 mil.	$222.8 mil.	$222.8 mil.	$222.8 mil.
Average loss per day	$1.8 mil.	$2.1 mil.	$2.1 mil.	$1.8 mil.	$1.5 mil.	$1.2 mil.	$1.0 mil.	$1.0 mil.
Potential loss of total sales of goods and services in the economy	$99.7 mil.	$224.9 mil.	$343.2 mil.	$398.2 mil.	$400.1 mil.	$400.1 mil.	$400.1 mil.	$400.1 mil.
Estimated average number of jobs at risk: 3/								
Total	23,830	26,890	27,350	23,800	19,140	15,950	13,670	12,760
Direct 4/	13,290	15,000	15,250	13,270	10,670	8,890	7,620	7,110
Other 5/	10,540	11,890	12,100	10,530	8,470	7,060	6,050	5,650
Potential loss of household income 6/	$36.8 mil.	$83.0 mil.	$126.7 mil.	$147.0 mil.	$147.7 mil.	$147.7 mil.	$147.7 mil.	$147.7 mil.
Potential loss of State and local government tax revenues	$6.4 mil.	$14.4 mil.	$22.0 mil.	$25.6 mil.	$25.7 mil.	$25.7 mil.	$25.7 mil.	$25.7 mil.

mil. Million.

1/ Based on an expected 6 percent average increase in overnight visitors for 1985.

2/ Developed by analyzing confidential data provided by the State Department of Transportation to estimate the number of anticipated United Airlines passengers to Hawaii who would not be accommodated on other domestic carriers.

3/ These are the average numbers of jobs supported by the estimated loss in visitor expenditures based on the DPED Inter-Industry (Input-Output) Model. It is not anticipated that all of these jobs would have been lost immediately, but rather gradually as the strike continued. This is because many employers would likely "carry" employees as long as possible, cut hours of work, or encourage employees to take vacation before laying workers off.

4/ Direct jobs are those supported by the direct expenditures of visitors.

5/ Other jobs are those supported by the respending of visitor dollars in the economy over time.

6/ As in footnote three, this total amount may not have been lost initially but as the strike continued, a higher proportion of the potential income loss per month would have been experienced.

Source: Department of Planning and Economic Development, Research and Economic Analysis Division, for the Governor's task force on the United Airlines strike, June 7, 1985.

The Hawaii Economy

Despite a strong showing in January, the rate of growth in visitor arrivals slowed considerably from February to April, with the overall first four months growth rate slowing to about the 6 percent rate forecast for 1985 as a whole (before the United Airlines strike). The number of overnight visitors from all origins increased 6.3 percent in the first four months of 1985 over the comparable 1984 period. The number of westbound visitors (coming from the U.S. Mainland and Canada) showed a 6.5 percent increase in the first four months while eastbound visitors (from Asia and the South Pacific) increased 5.4 percent in number.

Other data indicate that the visitor slowdown may have been accompanied by a slowdown in Hawaii's economy in general during the early months of 1985. The dollar volume of business transactions subject to State excise and use tax showed only a 3.7 percent increase in the first three months of the year. The reduced growth rate was due in large part to declines in sugar and pineapple shipments and in construction activity, which continued to experience labor problems in the first quarter.

State General Fund tax revenues for the first four months of the calendar year maintained the rapid rate of growth of the last quarter of 1984, showing a 13.8 percent increase from the first four months of 1984. General excise and use tax collections were up 7.6 percent in the first four months, somewhat below the 11.0 percent rate of increase experienced in the last quarter of 1984. Net individual and corporate income tax receipts also showed increases from the first four months of 1984, however, these data are rather volatile during the tax return season and a clear trend for the year has not yet been established.

The total number of jobs rose 1.6 percent in the first quarter of 1985 from the comparable 1984 period. This is the best quarterly growth since the second quarter of 1984 and appears to be due in large measure to a halt in the loss of jobs in construction.

U.S. defense expenditures in Hawaii during the first quarter of 1985 increased 1.0 percent from the same 1984 period. Defense expenditures in 1984 as a whole also increased only 1.0 percent, due to cutbacks in local purchases and a temporary shutdown of the Navy's Pearl Harbor Shipyards in December.

The U.S. Economy

Economic activity at the National level appeared to weaken considerably in the first quarter of 1985, with measured GNP growing at an annual rate of only 0.3 percent. This surprised most national economic forecasters who earlier in the year had, on average, expected a 3.8 percent growth rate in the first quarter. Despite the superficial indications of a stagnate economy, many economists think that the statistics may be understating actual economic activity in the U.S. for a number of reasons. Those reasons include the volatility of U.S. import and export data, slow income tax refunding in the first quarter by the IRS, and even some internal problems in the preparation of GNP estimates

such as the treatment of inflation and what goods and services are being measured. A similar slowdown in GNP occured in the third quarter of 1984 when data on U.S. foreign trade resulted in a low, 1.6 percent increase in GNP. The estimate of GNP rebounded to 4.9 percent in the last quarter of 1984. (In fact, the "flash estimate" by the U.S. Department of Commerce for GNP in the second quarter of 1985, issued in late June, indicated 3.1 percent annual growth rate from the first quarter.) Economists also note that in the area of servies, which are less prone to import competition, the U.S. economy is still performing at a vigorous pace. Thus, the low first quarter GNP growth is not (as yet) seen as portending an end to the U.S. economic recovery which is now in its third year.

Still, there is clearly cause for concern and the on-going trade deficit does represent a drain on the U.S. economy because it reduces the demand for domestically produced goods and some services (such as tourism). The root of the trade deficit is the high value of the U.S. dollar with respect to other currencies which, in turn, reflects the worldwide demand for high yield, U.S. financial securities. Until only recently, foreign desire to own U.S. securities has apparently more than compensated for the net U.S. demand for imports and kept the value of the dollar high. In recent months, however, some decline in the dollar's value has been observed indicating that the supply of dollars on the world market may be exceeding demand. If U.S. interest rates continue to decline as they have recently, future declines in the international value of the dollar can be expected.

Congressional efforts to produce a budget that would significantly reduce the Federal deficit were recently successful in the U.S. Senate where a compromise package was passed that could trim the estimated $175 billion, FY 1986 budget deficit by $56 billion. The focus of attention has now shifted to the House of Representatives where the chairman of the Budget Committee has vowed to match the Senate's deficit reduction for FY 1986. A shift to slower growth in the national economy would not be good news for efforts to reduce the deficit, however, because slower growth means fewer tax receipts than anticipated. Reduced tax revenue means that even more reductions in planned expenditures must be made to reduce the deficit, or that additional tax revenue must be generated.

2. Economic Outlook for the Nation and Hawaii

While economists are still confident that the U.S. recovery is probably not endangered by the slowdown in first quarter GNP, they have revised their forecasts for 1985 downward. The June 1985 consensus forecast compiled by Blue Chip Economic Indicators anticipates an overall 2.9 percent growth in 1985 GNP, down from a 3.9 percent projection made in March.

An effective deficit reduction plan passed by Congress could have a positive effect on the economic outlook by increasing expectations for both lower interest rates and a lower valued dollar. The latter would help boost U.S. exports, reduce imports, and perhaps put the economy back into high gear.

For Hawaii, it appears that the high growth rates experienced in 1984 for visitor arrivals, business transactions, and tax revenues have given way to more moderate growth as many local economists had expected. The outlook for the State's visitor industry has been clouded by the recent United strike and its uncertain impact on the balance of the peak summer visitor season.

Apart from the effects of the United strike, Hawaii's visitor industry faces stiff foreign competition for domestic and international visitors due to the continued, artificially high value of the dollar. That high value discourages foreign visits to the U.S. and encourages U.S. residents to travel abroad where the dollar may buy more than at home.

An effective Federal deficit reduction plan would be in the interest of Hawaii's visitor industry if it helped reduce the value of the dollar on the world market. Unfortunately, any deficit reduction plan will probably be at the expense of some Federal programs and defense spending, a situation which will affect Hawaii adversely. Even without further budget reductions, the Navy will be cutting back about 500 jobs at Pearl Harbor Shipyards before the end of this fiscal year as the result of existing nationwide cost cutting plans. A freeze in the U.S. defense budget (in constant dollar terms) for next fiscal year as proposed in the Senate budget, will put more cost-cutting pressure on Hawaii's military establishment. The Senate budget did, however, restore the impact aid program for schools with a high proportion of Federally connected students. This program is an important source of funds for Hawaii's Department of Education and was eliminated in the Administration's original budget proposal.

Another area of serious economic uncertainty for Hawaii is the clouded outlook for the sugar industry. If Congress renews the U.S. Farm Act without adequate support for the domestic sugar industry, the results for the sugar base of Hawaii's economy will be grave. Sugar's continued presence in the Act will give additional time to search for alternative uses for sugar products, by-products, and vacated sugar lands.

3. Income and Prices

Personal income in Hawaii grew 6.9 percent in 1984, slower than the 9.8 percent growth at the national level and also slower than the 7.3 percent growth in Hawaii's personal income experienced in 1983 when inflation was lower.

Honolulu Consumer prices in April, 1985 as measured by the Honolulu Consumer Price Index (CIP-U), moderated to a 3.4 percent increase over the same month of 1984. The Honolulu CPI-U rose an overall 4.1 percent from 1983 to 1984.

Figure 3-1

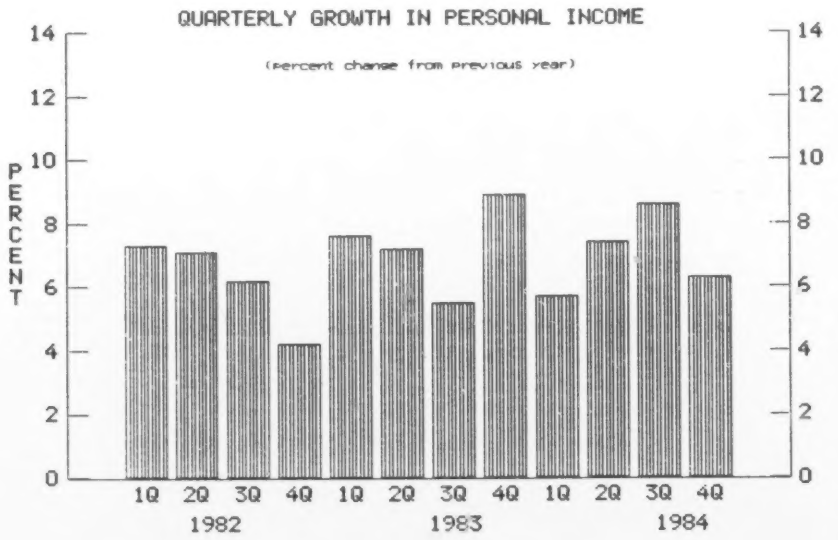


Figure 3-2

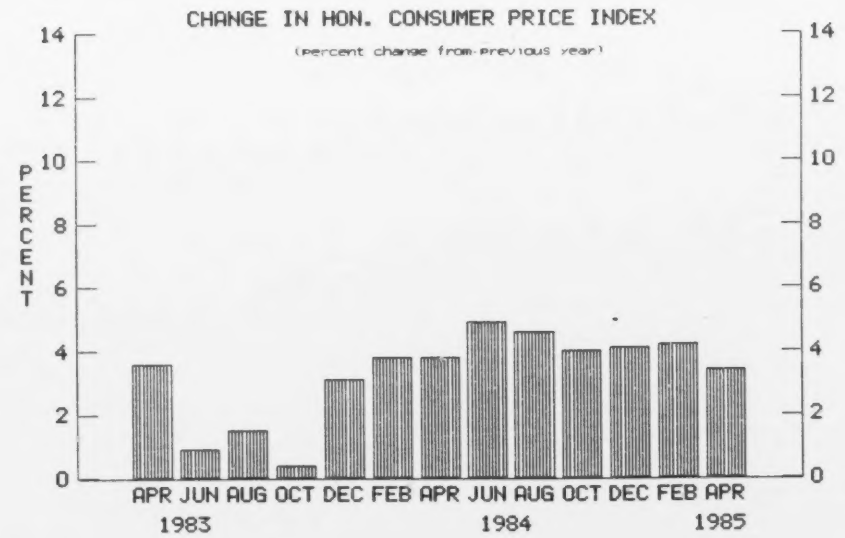


Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII QUARTERLY: 1980 TO 1984

[In millions of dollars]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980				
1st Q (r) ..	2,083,907	9,513	11.8	14.3
2nd Q (r) ..	2,110,281	9,596	10.6	12.4
3rd Q (r) ..	2,177,241	9,901	10.3	12.2
4th Q (r) ..	2,255,412	10,232	11.4	13.1
1981				
1st Q (r) ..	2,333,358	10,540	12.0	10.8
2nd Q (r) ..	2,380,584	10,725	12.8	11.8
3rd Q (r) ..	2,468,871	11,022	13.4	11.3
4th Q (r) ..	2,497,551	11,228	10.7	9.7
1982				
1st Q (r) ..	2,527,116	11,313	8.3	7.3
2nd Q (r) ..	2,560,121	11,487	7.5	7.1
3rd Q (r) ..	2,586,519	11,710	4.8	6.2
4th Q (r) ..	2,629,632	11,699	5.3	4.2
1983				
1st Q (r) ..	2,651,672	12,175	4.9	7.6
2nd Q (r) ..	2,705,157	12,309	5.7	7.2
3rd Q (r) ..	2,754,010	12,358	6.5	5.5
4th Q (r) ..	2,827,017	12,743	7.5	8.9
1984				
1st Q (r) ..	2,906,532	12,867	9.6	5.7
2nd Q (r) ..	2,970,393	13,218	9.8	7.4
3rd Q (r) ..	3,039,948	13,385	10.4	8.3
4th Q	3,086,435	13,549	9.2	6.3

r Revised from previous publication of this report.
1/ Seasonally adjusted, annual rates.
Source: U.S. Department of Commerce, Bureau of Economic Analysis, January 1985.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE UNITED STATES AND HAWAII ANNUALLY: 1970 TO 1984

[In millions of dollars]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970	803,922	3,566	689,190	2,974
1975	1,258,643	5,785	1,090,778	5,000
1980	2,156,710	9,811	1,820,875	8,312
1981 (r) .	2,420,091	10,878	2,033,294	9,243
1982 (r) .	2,575,847	11,552	2,172,840	10,025
1983 (r) .	2,734,464	12,396	2,330,993	10,759
1984 (p) 2/	3,000,827	13,255	(NA)	(NA)
	Percent change from previous year			
1980	11.0	13.0	10.9	12.8
1981	12.2	10.9	11.7	11.2
1982	6.4	6.2	6.9	8.5
1983	6.2	7.3	7.3	7.3
1984	9.8	6.9	-	-

r Revised from previous publication of this report.
p Preliminary.
1/ Except where noted otherwise, these represent the latest official annual data and may not be completely consistent with more recently published quarterly data.
2/ Estimated by DPED from quarterly data.
Source: U.S. Department of Commerce, Bureau of Economic Analysis; August 1984 (for disposable income), April 1985 for total personal income.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS FOR HONOLULU AND THE U.S. CITY AVERAGE: 1981 TO 1985

[1967=100]

Month and year	All items	Food	Housing 1/	Apparel and upkeep	Transportation	Medical care
Honolulu:						
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1983	273.5	306.7	257.5	207.7	253.7	357.6
1984	284.8	319.7	268.2	205.1	265.7	379.7
U.S. city avg.:						
1981	272.4	267.3	293.5	186.9	280.0	294.5
1982	289.1	278.2	314.7	191.8	291.5	328.7
1983	298.4	291.7	323.1	196.5	298.4	357.3
1984	311.1	302.9	336.5	200.2	311.7	379.5
Honolulu:						
1984: April ..	283.2	315.6	267.8	208.5	262.9	378.3
June ...	284.7	319.6	268.0	206.7	266.5	378.8
August .	286.0	322.7	268.2	199.7	268.7	384.1
October	287.4	322.6	271.0	200.1	268.5	384.3
December	289.8	331.3	271.1	203.2	268.2	386.8
1985: February	292.6	333.9	274.7	204.0	268.7	390.8
April ..	292.7	334.0	274.4	202.1	269.3	393.0
U.S. city avg.:						
1984: April ..	308.8	302.3	333.2	199.2	309.6	375.7
June ...	310.7	302.0	336.2	197.4	313.1	378.0
August .	313.0	304.8	339.5	200.1	312.9	381.9
October	315.3	304.1	340.9	205.2	316.1	387.5
December	315.5	305.1	341.2	203.2	315.8	388.5
1985: February	317.4	309.5	343.6	201.8	314.3	393.8
April ..	320.1	(NA)	(NA)	(NA)	(NA)	(NA)
Percent increase (Honolulu):						
1981 to 1982 ..	6.0	4.5	6.1	4.2	3.4	12.1
1982 to 1983 ..	2.2	2.6	1.0	3.1	-0.7	10.3
1983 to 1984 ..	4.1	4.2	4.2	-1.3	4.7	6.2
Apr. 1984 to Apr. 1985 ...	3.4	5.8	2.5	-3.1	2.4	3.9

NA Not available.

1/ Change in calculation in 1983 -- housing costs measured in rental equivalence (what owners would have to pay if they rented their homes).

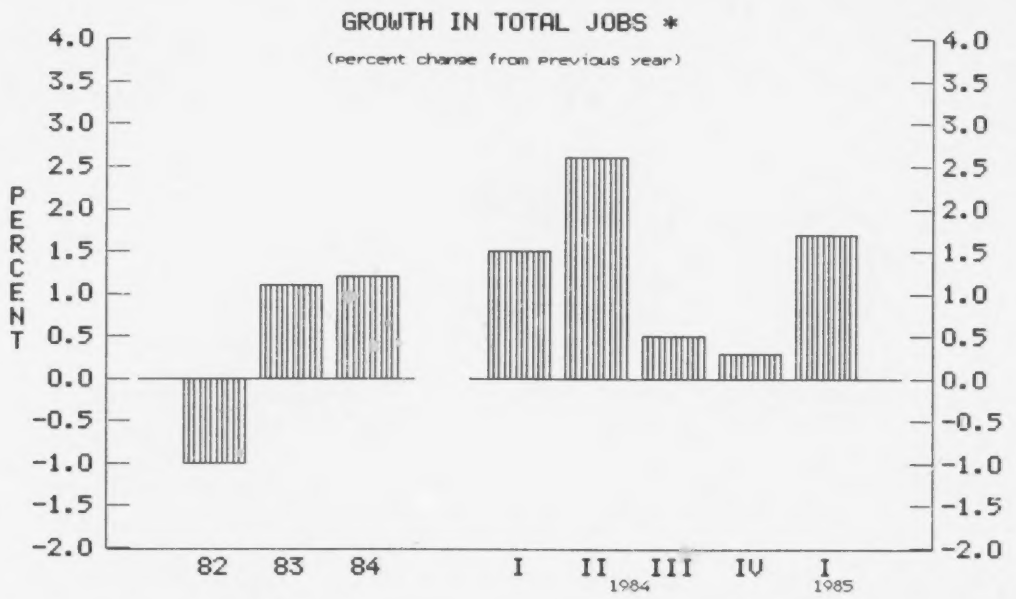
Source: U.S. Department of Labor, Bureau of Labor Statistics.

4. Employment

Revised jobcount data for 1984 show that the State experienced a 1.2 percent increase in jobs last year from 1983, rather than the slight, 0.3 percent increase indicated in earlier, preliminary data. Significant gains in retail trade and services were off-set partially by sharp declines in construction, manufacturing, and agriculture jobs.

For the first three months of 1985, the total State jobcount increased 1.6 percent over the same 1984 period. There were fewer industries recording job declines in the first quarter of 1985 than in 1984, but those that were (such as agriculture and manufacturing) appeared to be experiencing sharper declines than last year. One factor helping to increase the overall jobcount was the stabilizing of construction employment, which showed a 2.9 percent increase in the first quarter of the year. Construction experienced a 9.6 percent loss in jobs during 1984, which off-set some of the gains in trade and service activities.

Figure 4-1



*Total of Non Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non Ag. Self Employed Persons and Labor Disputes.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1985

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,100	428,450	404,100	24,350	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	440,450	425,100	399,400	25,750	15,250	11,300	3,950	100
1983 (r) ..	448,550	433,300	406,200	27,100	15,100	11,200	3,900	150
1984 (r) ..	454,100	439,200	412,450	26,750	14,450	10,800	3,650	450
1984 (r)								
1st Q ...	450,050	436,550	409,900	26,650	13,350	9,650	3,700	150
2nd Q ...	456,950	442,300	414,850	27,450	14,650	11,050	3,600	0
3rd Q ...	454,550	438,350	411,300	27,050	15,850	11,950	3,900	350
4th Q ...	455,150	439,800	413,850	25,950	14,000	10,600	3,400	1,350
1985 (p)								
1st Q ...	457,150	444,550	418,450	26,100	12,350	9,150	3,200	250
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.0	-1.6	-1.6	5.6	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.4	-3.1	-90.0
1982	-1.0	-0.9	-1.3	6.0	-4.1	-2.5	-9.2	100.0
1983 (r) ..	1.8	1.9	1.7	5.2	-1.0	-0.9	-1.3	50.0
1984 (r) ..	1.2	1.3	1.5	-1.3	-4.3	-3.6	-6.4	211.1
1984 (r)								
1st Q ...	1.5	1.6	1.6	1.7	-1.4	-2.5	1.4	(X)
2nd Q ...	2.6	2.8	2.8	2.6	-1.7	-2.2	0.0	-100.0
3rd Q ...	0.5	0.7	1.0	-3.6	-2.5	-2.8	-1.3	0.0
4th Q ...	0.3	0.4	0.8	-5.6	-10.8	-5.4	-24.4	2,600.0
1985 (p)								
1st Q ...	1.6	1.8	2.1	-2.1	-7.5	-5.2	-13.5	66.7

r Revised.
p Preliminary.
x Not calculated -- data in base period equaled zero.
Note: Data rounded to nearest 50 and detail may not add to totals due to rounding.
1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.
Source: Hawaii State Departments of Labor and Industrial Relations, and Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1984 AND 1985

Series	1984 (r)	1st Qrt. 1985 (p)	Percent change from previous year	
			1984 (r)	1st Qrt. 1985 (p)
Total jobs 1/	454,100	457,150	1.2	1.6
Non-agricultural (wage & salary)	412,450	418,450	1.2	2.1
Construction	16,100	17,450	-9.6	2.9
Manufacturing	21,800	20,850	-2.5	-3.7
Food processing	10,950	10,250	-2.7	-5.1
Transp., commun., utilities ...	31,850	32,200	2.4	2.4
Trade	110,550	112,050	3.5	3.3
Wholesale	18,900	18,850	2.7	0.8
Retail	91,[illegible]	93,200	3.6	3.8
Finance, insur., & real estate	31,850	32,050	-0.2	0.3
Services	108,550	110,400	3.4	2.8
Hotels	28,250	29,250	4.4	4.3
Government	91,700	93,450	0.4	1.6
Federal	32,000	32,250	-0.3	1.9
State	46,550	48,500	1.4	1.5
Local	13,200	12,700	-0.8	1.2
Agriculture (wage & salary)	10,800	9,150	-3.6	-5.2
Sugar	4,300	3,950	-4.4	-3.7
Pineapple	2,100	1,550	-8.7	-11.4
Diversified agriculture	4,400	3,600	-0.0	-5.3
Non-agricultural self-employed 2/	26,750	26,100	-1.3	-0.8
Agricultural self-employed 2/ ...	3,650	3,200	-6.4	-13.5
Labor disputes	450	250	200.0	66.7

r Revised.
p Preliminary.
1/ Total of non-agricultural and agricultural wage and salary, self-employed, and jobs involved in labor disputes.
2/ Self-employed includes unpaid family workers and domestics.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1985

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	399,400	325,700	28,700	15,150	29,900
1983 (r)	406,200	330,100	29,350	15,700	31,050
1984 (r)	412,450	334,600	30,300	15,700	31,850
1984 (r)					
1st Q	409,900	333,100	29,800	15,600	31,350
2nd Q	414,850	336,950	30,100	15,800	32,000
3rd Q	411,300	332,950	30,550	15,850	31,950
4th Q	413,850	335,450	30,700	15,600	32,100
1985 (p)					
1st Q	418,450	338,600	31,150	16,000	32,700
	Percent change from same period in previous year				
1980	2.2	2.2	2.9	6.1	4.0
1981	-0.2	-0.2	1.4	0.6	3.5
1982	-1.3	-2.0	-0.4	-0.3	5.1
1983 (r)	1.7	1.4	2.3	3.6	3.8
1984 (r)	1.5	1.4	3.2	0.0	2.4
1984 (r)					
1st Q	1.6	1.5	1.9	1.3	3.5
2nd Q	2.8	2.7	3.1	1.6	1.5
3rd Q	1.0	0.7	3.9	-0.6	5.2
4th Q	0.8	0.6	3.9	-2.2	6.1
1985 (p)					
1st Q	2.1	1.7	4.5	2.6	4.3

r Revised.
p Preliminary.
Note: Data are rounded to nearest 50 and detail may not add to total due to rounding.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1985

[Number of persons]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force:					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	340,350	41,950	20,100	36,750
1981	450,000	347,000	44,250	20,650	39,150
1982	460,000	352,050	45,450	21,300	42,200
1983 (r)	472,000	359,150	46,600	22,150	44,100
1984 (r)	473,000	360,400	46,850	21,850	43,900
1984 (r)					
1st Q	470,000	358,800	46,150	21,750	43,300
2nd Q	476,250	363,100	46,900	21,950	44,300
3rd Q	472,850	358,850	47,400	22,100	44,550
4th Q	472,850	360,800	46,850	21,650	43,550
1985 (p)					
1st Q	472,900	360,800	46,600	21,650	43,800
Civilian employment:					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	324,750	39,300	19,050	34,850
1981	426,000	329,900	40,850	19,450	36,800
1982	430,000	330,550	41,050	19,550	38,850
1983 (r)	442,000	338,550	42,350	20,450	40,650
1984 (r)	446,000	341,350	43,100	20,350	41,200
1984 (r)					
1st Q	443,050	340,350	42,250	20,150	40,300
2nd Q	449,700	344,650	42,950	20,450	41,600
3rd Q	446,150	339,650	43,950	20,550	41,950
4th Q	445,100	340,700	43,250	20,250	40,900
1985 (p)					
1st Q	450,600	345,400	43,200	20,450	41,550

r Revised.
p Preliminary.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1985

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons):					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,650	950	1,900
1981	24,000	17,100	3,400	1,200	2,350
1982	31,000	21,500	4,450	1,700	3,350
1983 (r)	30,000	20,600	4,300	1,700	3,450
1984 (r)	27,000	19,050	3,750	1,500	2,700
1984 (r)					
1st Q	27,000	18,500	3,900	1,600	3,000
2nd Q	26,550	18,450	3,950	1,500	2,650
3rd Q	26,700	19,200	3,450	1,500	2,550
4th Q	27,750	20,150	3,600	1,400	2,600
1985 (p)					
1st Q	22,300	15,400	3,400	1,200	2,300
Unemployment rate (percent):					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.3	4.6	5.2
1981	5.4	4.9	7.6	5.9	6.0
1982	6.7	6.1	9.8	8.7	7.9
1983 (r)	6.5	5.7	9.2	7.6	7.8
1984 (r)	5.6	5.3	8.0	6.8	6.2
1984 (r)					
1st Q	5.7	5.4	9.2	7.9	7.4
2nd Q	5.6	5.4	9.2	7.3	6.4
3rd Q	5.6	5.7	7.8	7.3	6.1
4th Q	5.8	5.9	8.3	6.9	6.4
1985 (p)					
1st Q	4.7	4.3	7.3	5.5	5.3

r Revised.
p Preliminary.
Source: Hawaii State Department of Labor and Industrial Relations.

5. Business Activity

Business activity slowed considerably in the first quarter of 1985 with the dollar volume of taxable transactions growing only 3.7 percent in the first three months of 1985 from the comparable 1984 period. By contrast, transactions increased 11 percent in the last quarter of 1984 from the same period a year earlier. Despite the slowdown in business activity, State General Fund Tax Revenues showed a 13.8 percent increase for the first four months of 1985.

Figure 5-1

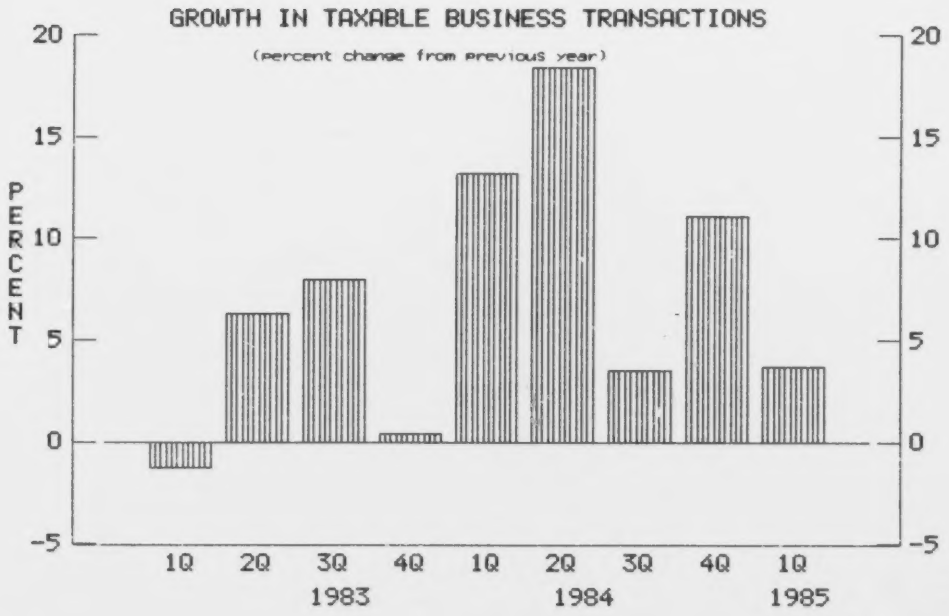


Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1985

[Millions of dollars]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manufacturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1983	21,416.8	7,458.8	2,128.5	858.2	221.6	502.3
1984	23,879.9	8,182.7	2,396.1	1,008.6	257.6	530.1
1984						
1st Q	5,820.9	1,981.4	554.8	239.6	60.1	126.2
2nd Q	6,528.1	2,181.9	662.2	318.6	69.3	153.4
3rd Q	5,806.5	1,998.7	606.6	237.3	58.7	130.5
4th Q	5,724.3	2,020.8	572.5	213.0	69.5	120.1
1985						
1st Q	6,036.5	2,098.4	590.2	337.2	64.7	111.8
	Percent change from same period in previous year					
1984						
1st Q	13.2	9.2	11.2	6.8	10.6	15.2
2nd Q	18.4	14.4	16.8	45.4	18.0	22.4
3rd Q	3.5	3.3	10.0	6.1	7.9	-8.9
4th Q	11.1	12.0	12.0	11.8	28.4	-3.3
1985						
1st Q	3.7	5.9	8.3	40.7	7.7	-11.4

Note: This series derived by lagging reported excise tax base data one month to adjust for reporting delay.

Source: Hawaii State Department of Planning and Economic Development based on raw data from Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1982 TO 1985

[Thousands of dollars]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State General Fund 3/
1982	574,590	296,757	34,785	1,011,465
1983	615,536	358,072	27,960	1,109,876
1984	669,805	413,885	39,681	1,240,352
1984 1st Q	165,120	112,154	9,588	293,272
2nd Q	173,806	81,345	14,681	313,706
3rd Q	165,634	111,966	10,437	317,326
4th Q	165,245	108,421	4,975	316,049
1985 1st Q	174,054	108,567	7,522	315,085
April	57,102	30,773	17,908	121,785
Jan-April .	231,156	139,340	25,430	436,870
	Percent change from corresponding period in previous year			
1982	-0.1	-15.1	-20.2	-5.5
1983	7.1	20.7	-19.6	9.7
1984	8.8	15.6	41.9	11.8
1984 1st Q	6.0	18.9	48.5	9.5
2nd Q	9.0	50.1	57.1	15.9
3rd Q	9.3	3.7	-7.9	7.4
4th Q	11.0	6.6	498.7	14.6
1985 1st Q	5.4	-3.2	-21.6	7.4
April	14.9	54.4	74.5	34.5
Jan-April	7.6	5.5	28.1	13.8

Note: This series represents data as reported by the Department of Taxation, without adjustment.

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

6. The Visitor Industry

Revised data from the Hawaii Visitors Bureau show that visitor arrivals increased 11.2 percent in 1984, rather than the 10.6 percent indicated by preliminary data. The first three months of 1985, however, have seen a softening of arrival rates from a 13.9 percent increase in January to just 1.7 percent in March. For the first four months of 1985, the total visitor count increased 6.3 percent from the same 1984 period, with westbound visitors up 6.5 percent and eastbound visitors showing a 5.4 percent increase.

The recent United Airlines pilots strike will obviously have an adverse effect on the visitor count for 1985. However, it is too early to tell exactly how seriously the industry was affected during the strike or what residual effects there may be from vacation plans altered permanently by the strike.

Figure 6-1

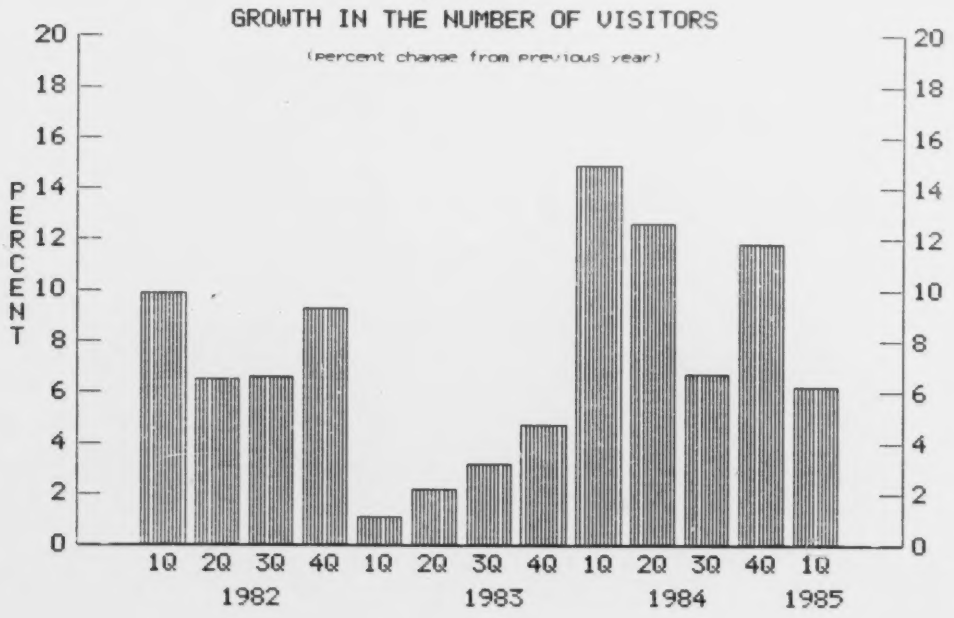


Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1970 TO 1985

Year	Visitors staying overnight or longer			Average daily visitor census 3/	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1970	1,746,970	1,326,135	420,835	32,028	36,943
1975	2,829,105	2,207,417	621,688	59,495	66,308
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,449	95,968
1982	4,242,925	3,278,525	964,400	94,740	105,310
1983	4,368,105	3,396,115	971,990	97,390	108,040
1984 (r)	4,855,580	3,721,380	1,134,200	106,260	118,660
1984 1st Q (r) ...	1,218,460	954,260	264,200	116,610	128,100
2nd Q (r) ...	1,206,810	923,040	283,770	102,210	114,960
3rd Q (r) ...	1,222,940	922,820	290,120	103,330	116,400
4th Q (r) ...	1,207,370	921,260	286,110	102,910	114,920
1985 1st Q (p) ...	1,293,870	1,016,710	277,160	(NA)	(NA)
April	408,800	315,180	93,620	(NA)	(NA)
	Percent change from corresponding period in previous year				
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.9	8.6
1983	3.0	3.6	0.8	2.8	2.6
1984 (r)	11.2	9.6	16.7	9.1	9.8
1984 1st Q (r) ...	13.9	12.9	17.7	18.4	17.9
2nd Q (r) ...	12.6	11.5	16.6	8.7	9.8
3rd Q (r) ...	6.7	3.2	14.9	2.4	4.1
4th Q (r) ...	11.8	11.2	13.7	7.0	7.5
1985 1st Q (p) ...	6.2	6.5	4.9	-	-
April	6.6	6.5	7.0	-	-

r Revised and rounded to the nearest ten; change from 20 percent to 10 percent sample size.
p Preliminary.
NA Not available.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
3/ Average number of westbound visitors present in the State.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS BY COUNTY: 1981 TO 1985

Year 1/	City and County of Honolulu	Hawaii County	Maui County	Kauai County
1981	2,398,477	672,683	1,389,892	757,811
1982	2,589,190	678,170	1,550,080	733,295
1983	2,688,110	737,180	1,698,630	713,930
1984 (r)	2,901,320	760,940	1,854,690	814,590
1983: 1st Q	657,570	198,595	427,885	157,400
2nd Q	671,095	168,105	406,750	176,915
3rd Q	722,365	183,920	443,435	202,015
4th Q	637,080	186,560	420,560	177,600
1984: 1st Q (r)	726,180	214,100	485,650	205,770
2nd Q (r)	722,140	179,940	467,970	201,790
3rd Q (r)	737,050	182,800	454,620	205,450
4th Q (r)	715,950	184,100	446,450	201,580
1985 1st Q (p)	748,930	205,530	520,740	224,030
	Percent change from corresponding period in previous year			
1981	(NA)	(NA)	(NA)	(NA)
1982	8.0	0.8	11.5	-3.2
1983	3.8	8.7	9.6	-2.6
1984 (r)	7.9	3.2	9.2	14.1
1983: 1st Q	-2.1	10.9	2.8	-17.0
2nd Q	0.7	2.7	5.7	-10.6
3rd Q	-0.9	3.3	9.8	-2.5
4th Q	-1.5	0.3	2.8	7.9
1984: 1st Q (r)	10.4	7.8	13.5	30.7
2nd Q (r)	7.6	7.0	15.1	14.1
3rd Q (r)	2.0	-0.6	2.5	1.7
4th Q (r)	12.4	-1.3	6.2	13.5
1985 1st Q (p)	3.1	-4.0	7.2	8.9

r Revised and rounded to the nearest ten; change from 20 to 10 percent sample size.
p Preliminary.
NA Not available.
1/ Data prior to 1981 are not comparable to later figures due to revisions.
Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1985

[Percent; survey does not include some large hotel chains]

Date	State	Waikiki	Hawaii Island	Maui Island	Kauai Island
Annual average:					
1970	71.2	74.1	68.3	66.7	58.0
1975	74.1	78.3	59.9	72.3	77.2
1978	79.5	82.1	65.0	80.4	83.3
1979	73.8	77.1	62.0	73.0	76.5
1980	69.3	71.7	52.7	66.2	69.6
1981	68.2	73.9	44.9	70.3	62.7
1982	70.4	77.7	44.0	73.9	57.5
1983 (r)	70.3	76.3	46.3	75.2	57.2
1984	76.0	81.2	55.6	80.5	63.0
1985 (Jan-Feb) .	88.3	93.5	73.6	89.1	76.0
1984					
January	74.9	84.2	51.3	77.1	48.8
February	89.3	94.3	72.4	91.9	74.5
March	88.1	92.0	68.1	90.8	78.1
April	75.9	80.0	52.1	88.8	61.0
May	72.9	76.1	50.8	82.1	62.9
June	77.8	85.3	50.2	77.9	66.5
July	75.1	81.1	53.8	78.7	58.0
August	78.8	84.6	54.5	84.0	66.0
September	70.0	75.7	51.1	69.8	59.6
October	75.8	78.9	59.1	83.1	65.6
November	77.1	82.5	60.7	80.1	60.5
December	72.4	80.9	52.5	69.3	55.6
1985					
January	84.4	92.1	64.0	83.4	66.6
February	92.8	95.3	83.3	95.5	85.4

r Revised

Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

Table 6-4.-- EXISTING HOTEL UNITS BY GEOGRAPHIC AREAS: 1970 TO 1985

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110
1984	62,448	36,848	32,239	7,149	5,313	13,138
1985	65,919	38,600	33,879	7,511	5,656	14,152

Source: Hawaii Visitors Bureau, Visitor Plant Inventory.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES BY ISLANDS: 1970 TO 1985

[Dollars]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	(NA)	(NA)	(NA)	(NA)
1975	29.75	(NA)	(NA)	(NA)	(NA)
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
1983 (r)	55.58	47.62	50.49	81.60	59.75
1984	59.25	49.45	57.17	88.89	65.05
1985 (Jan-Feb)	72.39	61.40	68.22	103.36	72.91
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983 (r)	7.4	6.3	6.6	8.8	2.2
1984 (r)	6.6	3.8	13.2	8.9	8.9
1985 (Jan-Feb)	19.1	20.5	28.3	11.8	4.9

r Revised.
NA Not available.
Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

7. Construction

The long slide in construction employment dating back to 1981 appeared to stabilize somewhat in the first quarter of 1985, with the number of jobs in the industry showing a 2.9 percent increase from the same period in 1984. Gross taxable receipts in construction continued to show a loss in the first quarter from a year before, but these data may be reflecting losses actually incurred during late 1984, when several concurrent labor disputes crippled the industry.

Construction in early 1985 was not without labor problems. For seven weeks in March and April about 200 striking iron workers tied up numerous projects. With these difficulties behind it, construction should be able to start showing gains from the previous year in terms of jobs and value of construction.

Figure 7-1

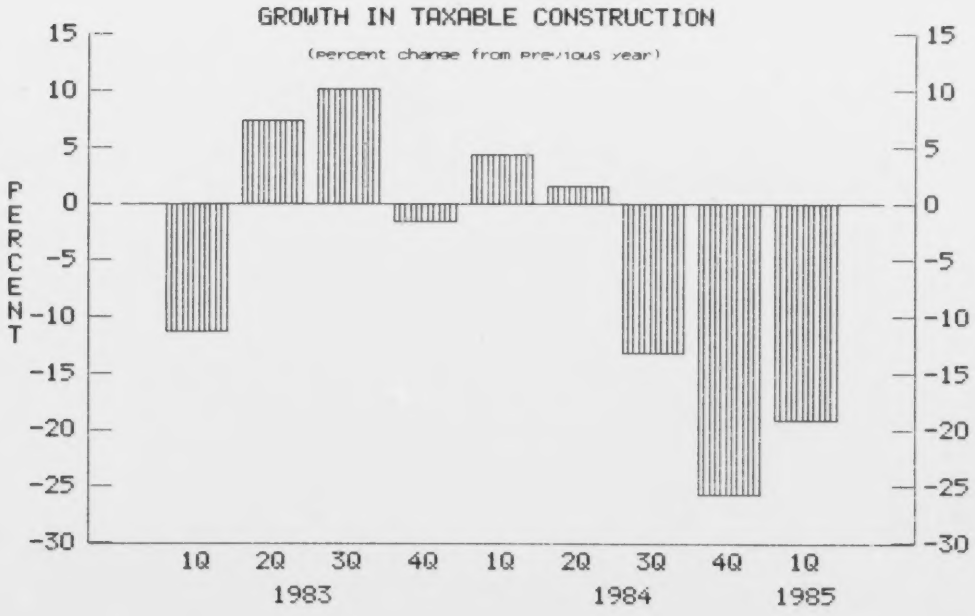


Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS, AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1985

[Millions of dollars]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1983	1,334.2	685.2	296.2	203.2	185.9	277.9
1984	1,227.2	578.4	324.7	105.6	148.1	411.8
1984 1st Q ...	332.1	145.8	75.5	32.3	38.0	65.9
2nd Q ...	365.0	154.4	89.7	29.8	34.9	124.8
3rd Q ...	297.1	136.0	73.0	24.2	38.9	84.1
4th Q ...	233.0	142.2	86.7	19.3	36.2	136.9
1985 1st Q	268.6	(NA)	(NA)	(NA)	(NA)	52.1
	Percent change from corresponding period in previous year					
1983	0.8	0.3	-1.0	-16.3	31.8	-29.3
1984	-8.0	-15.6	9.6	-52.0	-20.3	48.2
1984 1st Q ...	4.3	24.3	31.4	75.1	-8.2	-33.0
2nd Q ...	1.5	-1.6	34.1	-11.8	-38.0	427.0
3rd Q ...	-13.2	-35.7	-38.1	-49.3	-15.1	17.5
4th Q ...	-25.8	-28.8	60.6	-81.3	-14.7	62.6
1985 1st Q	-19.1	-	-	-	-	-20.9

NA Not available.

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1984

[Millions of dollars]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1983	685.2	366.8	86.7	140.5	91.3
1984	578.4	375.2	90.3	53.0	59.8
1984 1st Q ...	145.8	90.1	23.6	16.2	15.9
2nd Q ...	154.4	110.7	18.3	11.4	14.0
3rd Q ...	136.0	83.0	21.5	14.8	16.7
4th Q ...	142.2	91.5	26.9	10.7	13.2
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1983	0.3	-22.4	15.3	217.5	0.6
1984	-15.6	2.3	4.3	-62.3	-34.4
1984 1st Q ...	24.3	37.8	25.5	-24.3	34.7
2nd Q ...	-1.6	37.7	-17.6	-69.8	-15.1
3rd Q ...	-35.7	-40.4	-14.0	-53.7	9.4
4th Q ...	-28.8	11.6	29.8	-78.4	-72.3

NA Not available.
Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED BY AWARDING AGENCY: 1970 TO 1985

[Millions of dollars]

Year	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1983	277.9	84.7	126.8	66.4
1984	411.8	130.0	196.7	85.1
1984				
1st Q	65.9	8.7	38.9	18.3
2nd Q	124.8	33.2	78.0	13.6
3rd Q	84.1	5.9	58.4	19.8
4th Q	136.9	82.2	21.3	33.3
1985				
1st Q	52.1	7.4	7.9	36.8
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1983	-29.3	-39.3	-30.3	-6.7
1984	48.2	53.4	55.1	28.2
1984				
1st Q	-33.0	-25.7	-27.4	-44.7
2nd Q	526.0	478.3	828.5	42.3
3rd Q	17.5	-65.4	58.0	11.8
4th Q	62.6	63.1	-23.1	455.0
1985				
1st Q	-20.8	-14.3	-79.6	101.2

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1984

[Includes duplexes]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1976	3,383	1,384	821	297	881
1977	4,891	2,281	1,074	445	1,091
1978	5,219	2,270	1,382	567	1,000
1979	6,181	3,156	1,445	556	1,024
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1983	3,417	1,627	938	291	561
1984	4,278	2,349	928	361	640
1984 1st Q	1,092	651	224	70	147
2nd Q	1,160	654	252	96	158
3rd Q	1,115	568	250	111	186
4th Q	911	476	202	84	149
	Percent change from corresponding period in previous year				
1978	6.7	0.5	28.7	27.4	-8.3
1979	18.4	39.0	4.6	-1.9	2.4
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1983	49.5	124.4	17.3	26.5	5.8
1984	25.2	44.4	-1.1	24.0	14.1
1984 1st Q	21.9	38.2	-7.4	22.8	16.7
2nd Q	21.8	30.3	18.9	31.5	-4.2
3rd Q	29.4	43.4	4.2	38.8	27.4
4th Q	28.8	84.5	-17.2	3.7	20.2

Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1984

[Three or more units per structure]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1976	3,751	3,397	129	4	221
1977	3,129	2,389	129	83	528
1978	4,236	1,968	334	610	1,324
1979	6,351	1,804	718	1,125	2,704
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1983	1,341	1,220	38	73	10
1984	1,134	942	153	35	4
1984 1st Q	61	22	4	35	0
2nd Q	444	444	0	0	0
3rd Q	134	81	49	0	4
4th Q	495	395	100	0	0
	Percent change from corresponding period in previous year				
1978	39.1	-1.8	158.9	(X)	150.8
1979	49.9	-8.3	115.0	84.4	104.2
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1983	-70.8	-70.3	-84.5	-38.1	-91.8
1984	-15.4	-22.8	302.6	52.0	60.0
1984 1st Q	454.5	(X)	-63.6	(X)	(X)
2nd Q	264.3	298.0	(X)	-100.0	-100.0
3rd Q	-87.3	-91.6	81.5	-100.0	(X)
4th Q	376.0	279.8	(X)	(X)	(X)

X Not calculated -- data in base period equaled zero.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1984

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1976	21,400	36.2	19,350	5,650	22.6	8.80
1977	19,750	35.7	17,650	4,150	19.1	9.87
1978	20,650	36.6	18,900	2,500	11.7	10.53
1979	23,400	36.0	21,050	1,700	7.5	11.05
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	21,900	36.2	19,800	3,500	15.0	13.13
1982	17,850	35.8	16,000	4,000	20.0	14.50
1983 (r)	17,800	37.2	16,500	2,850	17.2	15.80
1984	16,100	36.6	14,750	(NA)	(NA)	16.46
1984 1st Q ..	16,950	38.1	16,150	(NA)	(NA)	16.36
2nd Q ..	16,950	35.8	15,150	(NA)	(NA)	16.51
3rd Q ..	16,250	37.6	15,300	(NA)	(NA)	16.43
4th Q ..	14,300	34.7	12,400	(NA)	(NA)	16.54
	Percent change from corresponding period in previous year					
1978	4.6	2.5	7.1	-39.8	(X)	6.7
1979	13.3	-1.6	11.4	-32.0	(X)	4.9
1980	2.4	0.6	3.1	55.9	(X)	7.2
1981	-8.6	0.0	-7.1	32.1	(X)	11.2
1982	-18.5	-1.1	-19.2	14.3	(X)	9.4
1983 (r)	-0.3	3.9	3.4	-28.7	(X)	9.0
1984	-9.6	-1.6	-10.9	(NA)	(X)	4.2
1984 1st Q ..	-6.4	-1.3	-7.5	(NA)	(X)	5.3
2nd Q ..	-4.8	-4.8	-9.5	(NA)	(X)	5.6
3rd Q ..	-9.2	-1.1	-10.0	(NA)	(X)	3.9
4th Q ..	-18.3	1.2	-17.3	(NA)	(X)	0.7

r Revised.
NA Not available.
X Not applicable.
1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.
2/ Equivalent number of jobs if all workers had worked a 40-hour week.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1985

[1967=100]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1979	266.2	248.3	288.8	264.3	237.6	287.5
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1983	331.5	276.5	400.9	352.1	294.6	402.0
1984 (r) ..	348.3	281.4	432.5	367.6	294.5	431.0
1984						
March ...	348.0	283.0	430.0	367.4	296.0	429.3
June	347.4	280.4	430.4	367.1	294.1	430.4
Sept. (r)	352.3	281.6	441.3	371.4	293.7	438.7
Dec. (r)	350.6	278.7	440.2	370.4	291.6	438.7
1985						
March ...	352.3	281.8	440.2	369.3	291.5	436.8
	Percent change from corresponding period in previous year					
1979	9.4	13.5	5.2	9.5	16.1	5.3
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1983	8.8	10.3	7.5	6.6	4.7	7.8
1984 (r) ..	4.9	1.8	7.8	4.2	0.0	7.0
1984						
March ...	7.4	5.7	8.9	5.4	1.2	8.0
June	3.2	-2.9	8.4	4.4	-0.1	8.0
Sept. (r)	4.2	-0.4	8.1	4.4	-1.0	7.8
Dec. (r)	3.2	-1.4	6.9	3.2	-1.8	6.2
1985						
March ...	1.2	-0.4	0.0	0.5	-1.5	1.7

r Revised.
1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

8. Major Sources of Income

The value of defense expenditures in Hawaii increased only 1.0 percent in 1984. The low growth appeared to be the result of two principal factors -- a decline in local purchases of goods and services from the high levels of 1981 through 1983, and the temporary shutdown of the Navy's shipyard facilities at Pearl Harbor in December.

The value of processed pineapple shipments from inventory in 1984 showed a healthy, 22 percent increase from 1983. Shipments of processed sugar increased only 1.4 percent in 1984 -- not surprising given the limits on domestic sugar prices. Shipments for both sugar and canned pineapple showed declines in early 1985, however, sharp fluctuations in shipments over short periods of time are not unusual, and may reflect inventory changes more than production levels.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1984

[Millions of dollars]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1980	2,875	1,317.4	594.1	226.5
1981	3,200	1,449.3	327.9	217.6
1982	3,700	1,693.4	351.5	206.0
1983	4,000	1,848.2	410.2	219.0
1984	4,500 (p)	1,867.2	(NA)	(NA)

p Preliminary.
NA Not available.
1/ Includes value of molasses.
Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaiian Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1985

[Millions of dollars]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1983	1,848.2	935.9	702.7	182.6	27.0
1984	1,867.2	948.2	685.2	207.6	26.2
1984					
1st Q	461.2	237.5	163.2	54.0	6.6
2nd Q	463.5	236.0	169.5	51.3	6.6
3rd Q	459.7	236.9	165.8	50.9	6.1
4th Q	482.8	237.8	186.8	51.3	6.9
1985					
1st Q	465.8	226.1	180.0	52.9	6.9
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1983	9.1	6.6	14.9	5.1	-9.7
1984	1.0	1.3	-2.5	13.7	-2.7
1984					
1st Q	-1.5	2.9	-12.9	23.3	0.4
2nd Q	2.3	-0.7	3.9	12.8	-5.6
3rd Q	-0.8	3.0	-7.0	6.3	-14.8
4th Q	4.2	0.1	7.3	13.0	11.4
1985					
1st Q	1.0	-4.8	10.3	-2.1	3.9

Note: Data include all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1985

Year	Value of shipments 1/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 2/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1983	421.5	174.2	25.3	-8.0
1984	427.2	213.3	1.4	22.4
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	43.1	47.4	49.1
1983				
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
3rd Q	136.2	50.9	35.4	-19.3
4th Q	79.4	50.3	-13.7	16.7
1984				
1st Q	90.1	53.6	-14.9	64.4
2nd Q	114.4	47.8	14.5	18.3
3rd Q	131.0	52.5	-3.8	3.0
4th Q	91.7	59.5	15.4	18.4
1985				
1st Q	84.6	35.4	-6.1	-34.0

NA Not available.

Note: These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 8-1, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

1/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

2/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- RECENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period	Number	Percent change	
				From preceding period	From same period in previous year
Resident population (r)					
State	Persons	July 1, 1984	1,039,000	-	2.0
City and County of Honolulu	Persons	July 1, 1984	805,300	-	1.6
Hawaii County	Persons	July 1, 1984	106,400	-	3.4
Kauai County	Persons	July 1, 1984	44,000	-	2.1
Maui County 2/	Persons	July 1, 1984	83,100	-	4.0
Income					
Total personal income 3/	$ Million	4th Qtr. 1984	13,549	1.2	6.3
Consumer price index (Honolulu)					
All items	(1967=100)	April 1985	292.7	0.0 4/	3.4
Food prices	(1967=100)	April 1985	334.0	0.0 4/	5.8
Construction					
Total private permits	$ Million	1984	578.4	-	-15.6
Total residential permits	$ Million	1984	324.7	-	-9.6
New single-family units	Number	1984	4,278	-	25.2
New multi-family units	Number	1984	1,134	-	-15.4
Government contracts awarded	$ Million	1984	411.8	-	48.2
Construction cost indexes (Hon.)					
Single family	(1967=100)	March 1985	352.3	-	1.2
High-rise buildings	(1967=100)	March 1985	369.3	-	0.5
Employment (r)					
Total civilian labor force	Persons	1984	473,000	-	0.2
Civilian employment	Persons	1984	446,000	-	0.9
Civilian unemployment	Persons	1984	27,000	-	-10.0
Unemployment rate	Percent	1984	5.6	-	-
Total jobs	Number	1984	454,100	-	1.2
Visitor industry (r)					
Total visitors	Number	1984	4,855,580	-	11.2
Westbound	Number	1984	3,721,380	-	9.6
Eastbound	Number	1984	1,134,200	-	16.7
Visitor expenditures (p)	$ Million	1984	4,582	-	15.3
Hotel units	Number	Feb. 1985	65,919	-	5.5
Defense expenditures	$ Million	1984	1,867.2	-	1.0
Sugar production	$ Million	1983	410.2	-	16.7
Pineapple sales	$ Million	1983	219.0	-	6.3

r Revised.
p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ Includes Kalawao County.
3/ Seasonally adjusted at annual rate.
4/ From February.

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STATE OF

HAWAII

QUARTERLY STATISTICAL and ECONOMIC REPORT

THIRD QUARTER 1985

- The Economy - Recent Trends
- Growth of Jobs, Income, and the "Brain Drain"
- Statistical Tables

RESEARCH AND ECONOMIC ANALYSIS DIVISION
DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

Third Quarter 1985

Research and Economic Analysis Division
Department of Planning and Economic Development
State of Hawaii

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore, Karen Yamashita, Tu Pham, and Sharon Nishi.

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1. The Economy -- Recent Trends

The effects of the month-long United Airlines pilots strike during May and June are evident in recent visitor statistics. During the second quarter of 1985, the number of westbound visitors (from the U.S. Mainland and Canada) decreased 9.1 percent, off-setting the 6.0 percent increase during the first quarter.

The Hawaii visitor industry has also been adversely affected by the strength of the U.S. dollar, which has discouraged the foreign visitor to the U.S. and encourages U.S. residents to travel abroad. The number of eastbound visitors (from Asia and the South Pacific) during the second quarter slowed to 0.7 percent growth and the data showed a 0.7 percent decline for the July to August period. Estimates for the first eight months of this year showed only a 0.9 percent growth in the total number of visitors compared to 11.2 percent for the same period last year.

In the beginning of the year, a moderate 6 percent visitor growth was anticipated as compared to the 11.2 percent growth experienced in 1984. However, the strike and the slowdown in the number of eastbound visitors have caused DPED economists to revise their projections to a more modest 2 to 3 percent growth for the year.

Business activity measured by the volume of taxable transactions also reflected the United strike. The hotel rental tax base for the second quarter declined 9.1 percent from the same period a year ago. In addition, other sectors such as the retailing and services industries, which rely heavily on visitor spending, showed a slowdown in activity.

Other industries also contributed to the slowdown in Hawaii's economy. The value of processed sugar and canned pineapple showed large decreases during the second quarter and the construction industry also experienced moderate decreases. Despite the slowdown, the State General Fund Tax Revenues showed a 9.8 percent increase in the second quarter.

The total number of jobs in the State increased moderately during the second quarter bolstered by the construction industry. More construction jobs were filled to complete backlogged projects caused by the iron workers labor dispute earlier in the year.

Because of the relatively short duration of the United Airlines pilot strike, widespread layoffs did not occur in the hotel industry. However, the strike curtailed growth and reduced the average weekly hours and earnings of hotel employees.

Agricultural jobs during the second quarter increased from the previous period because of seasonal hirings for sugar and pineapple. Preliminary State Department of Labor estimates indicated a decrease in all sectors of agricultural employment. However, more recently revised data from the Department of Agriculture indicate a more stable employment picture with moderate decreases in sugar and pineapple employment compared to last year and slight increases in diversified agricultural jobs.

The employment outlook for the rest of the year appears brighter as the Navy cancelled the scheduled layoffs of 500 civilian workers at the Pearl Harbor Naval Shipyard. The shipyard is the State's largest industrial employment center where the average worker earns over $13 an hour. The layoffs, which would have occurred in November, could have adversely affected the income and employment picture in the State.

Construction, another high-salaried industry, is expected to continue its growth since all labor disputes have been resolved. In addition, private building authorizations, an indicator of future building activity, have been increasing in 1985, reversing the 1984 trend.

The clouded outlook for the sugar industry looked a little brighter as the House passed the Farm Act recently with the sugar support program still intact. The bill extends the current 18 cents per pound support program through 1990. According to the Hawaiian Sugar Planters' Association, that level is close to current production costs and efforts will still be needed to cut current costs. The farm bill must still pass the Senate, where a similar combined lobbying effort will hopefully keep the program intact. The passage of the Farm Act should provide some stability in the industry for the next several years, giving additional time to search for new sugar products and by-products, and alternative uses for vacated sugar lands.

Defense expenditures during the second quarter of 1985 grew 16.2 percent from the same 1985 period due to increases in purchases of supplies, equipment, and services by all branches of the military. The largest gain was attributed to the Army where purchases increased by $40 million due to a backlog of construction projects and the installation of a large computer network system. However, because of the accounting system used to compile the reports, it is not clear how much the local economy benefited from the expenditures since most of the equipment was not manufactured in Hawaii.

Personal income in Hawaii grew 7.4 percent during the first quarter of 1985, slightly slower than 7.7 percent growth at the national level, but an improvement over the previous period. The growth of personal income outpaced the rate of inflation which continued to increase moderately. The rate of inflation, as measured by the Honolulu Consumer Price Index for all urban consumers (CPI-U) in August was only 2.9 percent over the same month in 1984, lower than the national average of 3.4 percent.

Figure 1-1

Figure 1-2

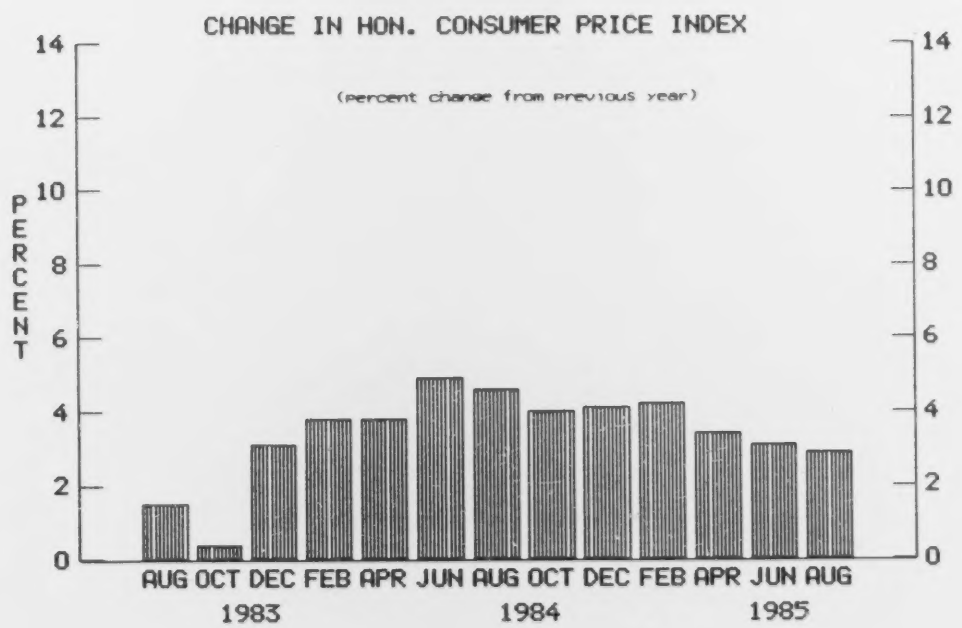
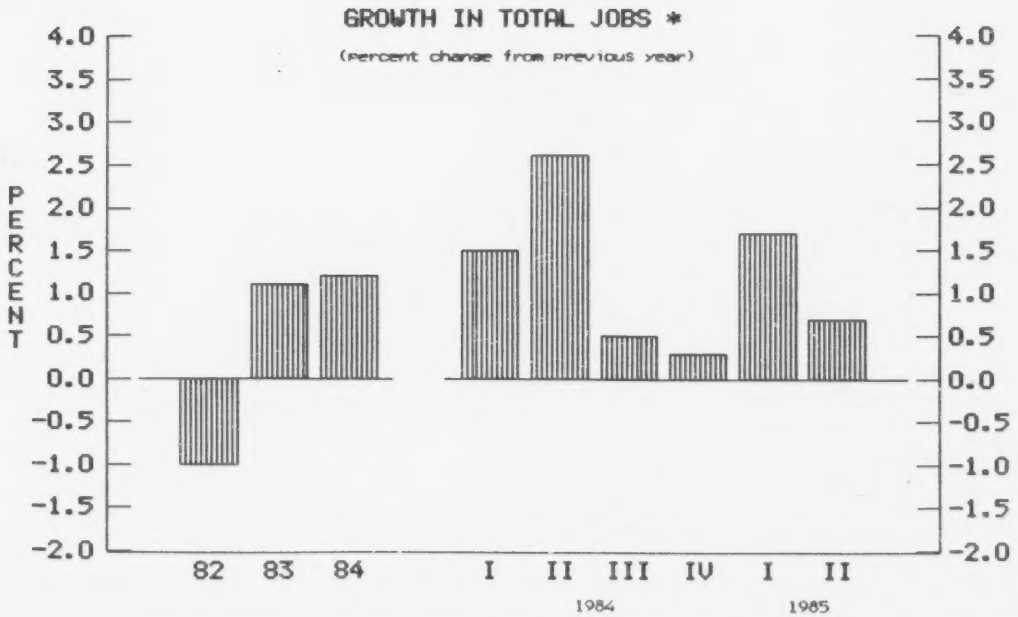


Figure 1-3



*Total of Non Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non Ag. Self Employed Persons and Labor Disputes.

Figure 1-4

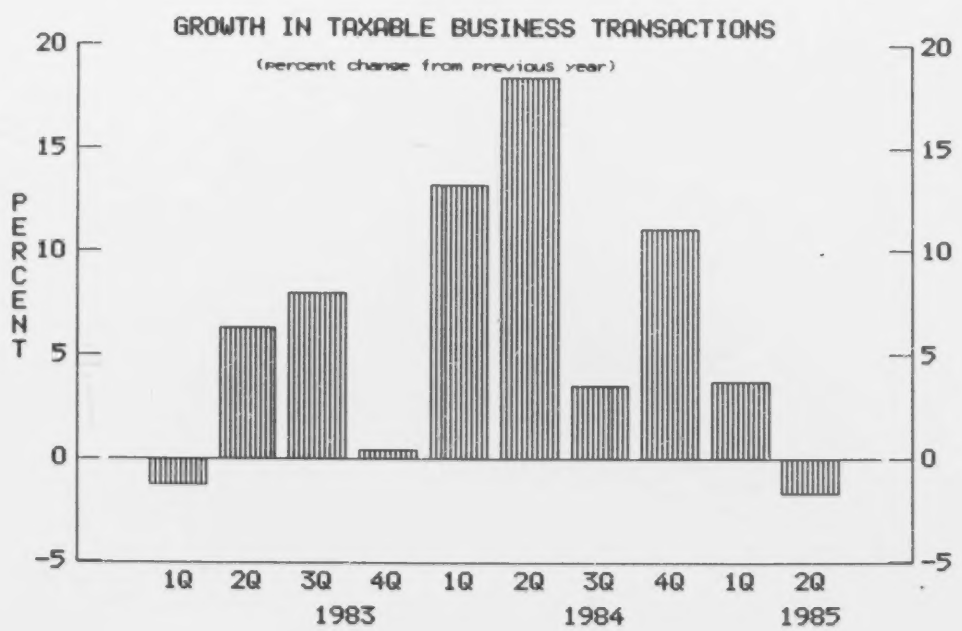
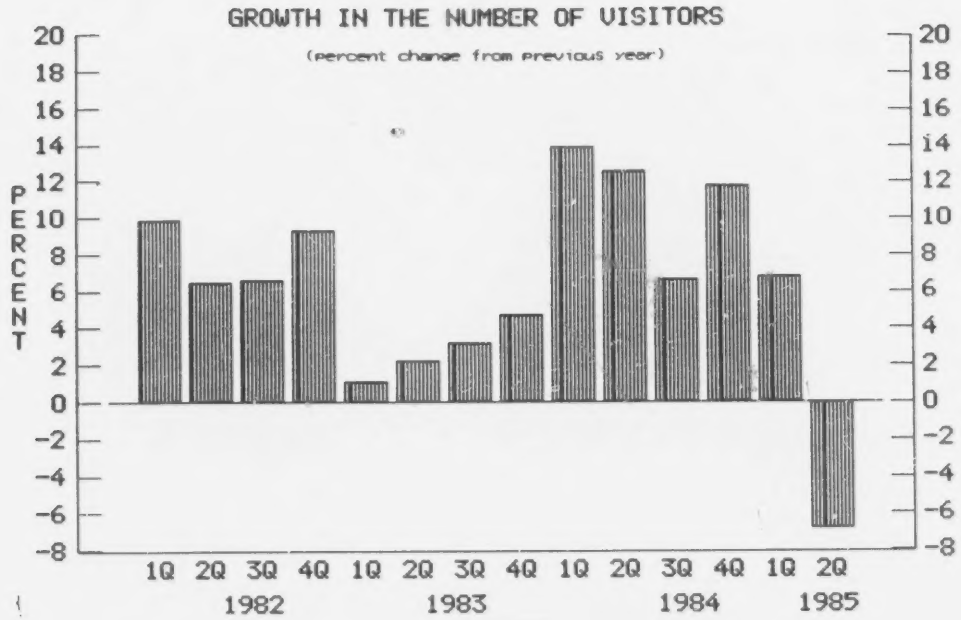


Figure 1-5



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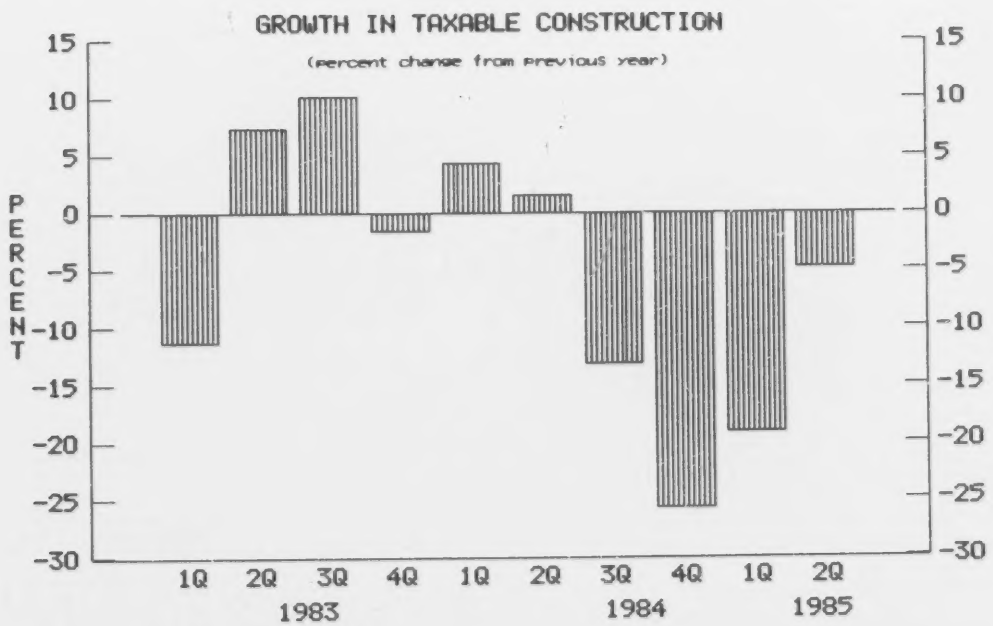

2. Growth of Jobs, Income, and the "Brain Drain"

There has been a growing concern in recent years over the slow growth of jobs and income in Hawaii. It has been observed that in the past five years, while 50,000 civilians entered Hawaii's job market, only 9,000 jobs were created in Hawaii. It has also been pointed out that the growth of jobs has not only been slow but also mostly confined to the low paying jobs.

As a consequence, it has been alleged that there has been an exodus of Hawaii's young people to the Mainland.

The above three assertions have been widely accepted as facts and a supposedly poor "business climate" in Hawaii has been blamed for such a poor performance of Hawaii's economy. The purpose of this chapter is to review these three assertions based on the recent data.

1. The Growth of Jobs

It is true that the job growth has been very slow since 1980. The total number of jobs increased only 10,000 in four years between 1980 and 1984. The number of jobs actually declined 1 percent in 1982, and the growth rates of jobs have been less than 2 percent since 1981 (see table 2-1).*

The civilian labor force, however, increased steadily from 438,000 to 473,000 between 1980 and 1984, or an increase of 35,000 in four years (table 2-1). Therefore, given the high labor force participation rates in Hawaii, it is possible that there has been a shortfall of as many as 25,000 jobs not counting job openings due to death and retirement.

The unemployment rate in Hawaii, consequently, increased from 4.9 percent in 1980 to 5.6 percent in 1984 (table 2-1).

If, however, we review the growth trend of jobs on a more long-term basis, the picture of job growth in Hawaii is much brighter. Between 1974 and 1984, the State's economy added 79,500 jobs, or an average of about 8,000 jobs per year (see table 2-2). The gain in jobs over the last 10 years is even more impressive if we subtract the jobs in the boom and bust cycles of Hawaii's construction industry. When construction jobs are subtracted from the total jobcount, the rest of the economy added 9,100 jobs per year over the 10-year period, an average growth rate of 2.4 percent per

---

*There is some confusion about the actual growth of employment in Hawaii due to contradictory statistics. The jobcount -- based largely on administrative records -- increased by only 10,000 from 1980 to 1984. However, the number of employed persons -- obtained through a separate, household survey -- showed an increase in 29,000 over the same period. This is quite a discrepancy and it is possible that the jobcounts and household surveys both contain considerable error.

year. Even during the period between 1980 and 1984, Hawaii's non-construction jobcount grew by an average of 4,400 jobs per year, or 22,000 jobs for the four-year period between 1980 and 1984.

Two conclusions about job growth can be drawn from the available data. First, job growth rates vary, depending on the source of the data and reference date of comparisons. On a long-term basis, the growth of jobs in Hawaii has probably been adequate not only for providing employment to local residents but also to a large number of in-migrants. In the short run, Hawaii's economy and job growth have been affected by two national recessions since 1980. The effects of the 1980 and 1981-82 recessions were especially severe since they followed the boom years of 1975-1980.

Second, the slow growth of jobs since 1980 has been a nationwide problem which is the result of short-term fluctuations in the national economy (i.e., two recessions since 1980). During the 1980 recession, U.S. civilian employment declined 2.9 percent between February 1980 and July 1980, and the unemployment rate increased to 7 percent from 5.8 percent in 1979. During the 1981-82 recession, U.S. civilian employment declined 1 percent between July 1981 and February 1983 and the unemployment rate increased to 9.5 percent in 1982. The impacts of the national recessions were different on each State and depended on the local economic structure and composition of industry. The employment decline was very heavy among the Northeast Central States, such as Michigan, Ohio and Illinois, whereas Southwestern States such as Texas and Oklahoma were not affected much. Hawaii was fortunate in that the impact of the national recession was milder than in other States. The impact of the 1980 national recession was felt in Hawaii in 1981 when the annual job growth rate declined from 2.2 percent in 1980 to 0.2 percent in 1981. The impact of the 1981-82 recession then further decreased the job growth rate to minus 1 percent in 1982. Hawaii's economy rebounded in 1983 following the improvement of the national economy, and the annual job growth increased 1.8 percent.

2. Per Capita Income

In addition to the slow growth of jobs, it has been pointed out that most of the new jobs are confined to low-paying categories in services and trade activities, mostly as a result of the growth in tourism. The lack of high-paying and high-tech jobs, therefore, has allegedly caused the out-migration of Hawaii's young people to Mainland States and a decline in living standards in Hawaii.

The review of job growth in recent years seems to confirm that most of the job growth has indeed occurred in service and retail industries, such as hotels, and eating and drinking establishments. There has also been a steady decline of jobs in sugar, pineapple, and diversified manufacturing industries.

Since the average wages in the service and retail industries are lower than the average wage rates in manufacturing, the faster growth of low-paying service and retail jobs relative to the high-paying manufacturing jobs will decrease the per capita income of Hawaii's residents.

The data show that the 1984 per capita personal income of Hawaii was $13,042, 2 percent higher than the national average of $12,789. Per capita personal income is, therefore, still higher than the national average but the differential has been decreasing since 1970. It was 18 percent higher than the national average in 1970. If this trend continues, the per capita income of Hawaii could, therefore, decrease below the national average, a situation which did occur during the 1950s.

The cost of living in Hawaii is also much higher than the national average and the living standard of Hawaii's residents is therefore lower than the national average (and probably always has been).

The reason for this steady decline in the Hawaii-to-national ratio in per capita personal income cannot be entirely explained by the changes in the industrial composition of Hawaii's economy alone. To the extent that per capita personal income is obtained by dividing the total personal income by the size of the population, the changes in both variables affect the per capita income changes.

For example, during the 1981-84 period, per capita personal income increased 21.3 percent nationally, whereas it increased only 17.6 percent in Hawaii. The slower growth of per capita personal income during the time period is, however, the result of a more rapid increase of population in Hawaii rather than decrease in the growth rate of total personal income. The 1981-84 growth for total personal income was almost identical for Hawaii (24.5 percent) and the United States (24.8 percent), but population increased 5.9 percent in Hawaii, compared with only 2.9 percent nationally during the same time period.

Population and the labor force characteristics by sex and age are also determinants of per capita income wage trends. During the 1970s, Hawaii, like the rest of the Nation, experienced large increases in the civilian labor force due to the initial entrance of the baby-boom generation and the very rapid increases in the labor force participation rates of women. Data from the U.S. Bureau of the Census show that the Hawaii civilian labor force grew on the average by 14,100 persons annually between 1970 and 1980. More than half of the increase was accounted for by women. By age, 44 percent of the increase or 6,200 persons came from the 25 to 34-year-old group (table 2-3).

Women became more job-oriented and greatly influenced the employment market in the 1970's, reaching 46 percent of the civilian work force in 1980, up from 41 percent in 1970. In terms of net increases in the labor force, women outnumbered men in many occupational and industrial groups over the 10-year period. Consequently, they also increased their comparative shares over men in many fields. However, as shown in table 2-4, women in the labor force played a less significant role in highly-skilled and highly-paid physical and professional lines of work.

In general, women also lagged behind men in earnings, even though they made significant progress, according to the U.S. Bureau of the Census. The number of working women increased at a rate of 8,100 persons per year between 1970 and 1980, while men increased only 6,600 per year. More women held part-time jobs than men, although the difference had diminished over the decade. Furthermore, despite advances in the labor force, income for women was still comparatively low. (Women's earnings had more than doubled between 1969 and 1979, yet median income for women in 1979 was still only 64 percent of median income for men.)

A similar analysis of the baby-boom generation shows their proliferation in traditionally lower-skilled occupations and industries (and an overall younger labor force) from 1970 to 1980.

Current estimates for 1985, from the DPED long-range population and economic projection model, indicate continued growth in the labor force, but decreasing from 14,100 annually to 10,500 (table 2-3). In contrast, future growth in the civilian population (non-military connected) is estimated to grow at the same level (table 2-5) as in the 1970 to 1980 period, illustrating the impact of age levels on the labor force. The baby-boom generation is moving into the prime-age labor force (the age level with the highest participation rates) and accounts for the majority of the increase, although not as much as their initial entrance in the 1970s. In addition, because of low birth rates following the baby-boom generation, the non-military-connected civilian population, 5 to 14 years, decreased from 1970 to 1980. This effect, in turn, is likely to cause a decreasing rate of growth of the labor force in 1985 and future years.

The Hawaii projections to 1990 assume the State will follow U.S. trends, with continued moderate increases in labor force participation rates for women and a decreasing rate of growth in the total labor force compared with the previous decade. The 1985 to 1990 period is influenced by demographic factors similar to those of the 1980 to 1985 period and the growth is projected to be slightly slower than the 1980 to 1985 period for both population and labor force.

3. "Brain Drain"

There are no recent data on out-migration from Hawaii and its characteristics by educational and skill attainments since the 1980 census. It is, therefore, difficult to ascertain the magnitude of the alleged "brain drain" of Hawaii's young people, although there are a few well publicized examples.

The magnitudes of the out-migration and "brain drain" are, therefore, inferred from the differences between the demand for jobs stemming from the increase of labor force and the supply of new jobs. Unfortunately, the relationship between migration and excess supply of labor is not simple. The labor mobility of Hawaii-born residents may be limited due to the geographical isolation and the ethnic and cultural preferences of Hawaii's residents. The magnitude of out-migration by educational and skill categories, therefore,

cannot be accurately estimated by comparing the gross data on the labor force and job supply alone.

A recent study by DPED utilizing 1980 census data on interstate migration (Statistical Report 178, "Lifetime and Recent Migration To and From Hawaii, 1980," DPED, September 1985) indicates that out- and in-migration were roughly balanced between 1970 and 1980 and did not reveal any massive net out-migration, or "brain drain" from Hawaii during the period under study.

As stated before, we do not have information on the characteristics of out-migrants since the 1980 Census. We do have, however, annual data on in-migration to Hawaii, and we can, therefore, estimate the magnitude of net-migration. As table 2-6 shows, there has been a 29,100 civilian net in-migration between 1980 and 1984 period, or an annual average increase of 6,847. The magnitude of net migration is smaller than in the 1970-1980 period, which averaged 19,070 net in-migrants per year. The fact remains, however, that in-migrants to Hawaii still outnumber out-migrants from Hawaii. Since the occupational characteristics of the recent out-migrants are not available, we do not have a recent estimate on the magnitude of a "brain drain." We can, however, infer the relative magnitude of out-migrants by occupational categories based on the available data.

The 1984 data on westbound intended residents by occupation, excluding military and military dependents, indicate that about half of the 4,690 intended residents were in the professional, technical, business, and managerial occupations. Given the fact that the total magnitude of out-migration is smaller than in-migration, and there has also been substantial in-migration to Hawaii by professional, technical, business, and managerial people, the relative magnitude of net out-migration by professional, technical, business, and managerial occupations, therefore, may not be large, if it exists at all, although the precise number is not known.

Most of the published cases of "brain drain" seem to be related to Hawaii college students staying on the Mainland after graduation due to the lack of suitable high-tech jobs in Hawaii. As table 2-7 shows, there were 3,692 college students from Hawaii studying on the Mainland while there were 2,609 out-of-State college students in Hawaii during 1981. Although this table shows a net out-migration of about 1,000 college students, we do not know exactly how many of the college students from Hawaii remain on the Mainland after graduation. It is known, however, that many of the out-of-State college students remain in Hawaii after graduation, and perhaps as many college students from Hawaii may remain on the Mainland after graduation. To the extent that more college students from Hawaii are studying at Mainland schools than out-of-State college students studying at colleges in Hawaii, it can be inferred that more Hawaii college students may remain on the Mainland after graduation. Unfortunately, there is no published source of data known to us to measure the exact magnitude of the out-migration by college students after graduation. The number of Hawaii's college students staying on the Mainland after graduation,

however, may be a few hundred at most, relatively small in number when compared with the total labor force in Hawaii of almost a half million. In 1981, about 13,600 college students remained in Hawaii to attend school, or roughly four out of every five college students.

4. Summary

In summary, the recent slowdown of Hawaii's economy and job growth is mostly a result of a short-term cyclical trend brought about by two national recessions since 1980. When viewed in the long run, the trend in job growth in Hawaii has been much better than the national rate of growth. Second, slower per capita income growth in Hawaii, compared to the U.S. average, is only partly attributable to the growth of low-paying, low-skill jobs. Another important factor has been the large increases in the working-age population and more women entering the job market. Lastly, there have not been conclusive data showing a large net out-migration of professional, technical, managerial, and business people. There are, however, a substantial number of both in- and out-migration, to and from Hawaii, especially among young professional, technical, and business people.

5. Prospect for Jobs and the Economy

The short-term prospect for jobs in Hawaii will critically depend on national economic conditions and the policies of the Reagan Administration. As long as the large Federal Government deficit exists, real interest rates will remain high and will limit the recovery of Hawaii's construction industry. The increasing trade deficit and uncertainty of U.S. trade policies, especially towards developing countries in Asia, will hamper the prospects of economic growth for both the nation and Hawaii.

The long-term prospect for Hawaii's economic growth is, however, much better. The total jobcount is expected to increase to 607,900 and the resident population is projected to reach 1,267,800 by the year 2000. Income projections also reveal significant growth, although much less so on a per capita basis.

The Gross State Product is expected to increase from $11.3 billion in 1980 to $18.3 billion (in 1980 dollars) in the year 2000. Similar increases are likely in personal income. Per capita personal income, however, is projected to only rise moderately from $10,188 in 1980 to $13,103 (in 1980 dollars) in the year 2000.

Table 2-1.-- HIGHLIGHTS OF EMPLOYMENT IN HAWAII: 1974 TO 1984

Year	Civilian labor force			Jobs		
	Total	Employed	Unemployment rate	Total 1/	Construction	Non-construction
1974	375,000	345,350	7.9	374,600	27,900	346,700
1975	382,950	351,100	8.3	380,900	26,350	354,550
1980	438,000	417,000	4.9	444,100	23,950	420,150
1981	450,000	426,000	5.4	445,050	21,900	423,150
1982	460,000	430,000	6.7	440,450	17,850	422,600
1983	472,000	442,000	6.5	448,550	17,800	430,750
1984	473,000	446,000	5.6	454,100	16,100	438,000

1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.

Source: Hawaii State Department of Labor and Industrial Relations and the Department of Planning and Economic Development.

Table 2-2.-- JOBS BY INDUSTRIES: 1974 AND 1984

Subject	1974	1984	Difference 1974-1984	Ave. ann. % change 1974-1984
Total jobs	374,600	454,100	79,500	1.9
Total non-agr. wage & salary	335,900	412,450	76,550	2.1
Contract construction	27,900	16,100	-11,800	-5.3
Manufacturing	22,700	21,800	-900	-0.4
Pineapple processing	2,550	2,150	-400	-1.7
Sugar processing	3,700	3,700	-	0.0
Textile & apparel	3,750	2,950	-800	-2.4
Printing & publishing	2,700	3,150	450	1.6
Trans., comm., utilities	26,300	31,850	5,550	1.9
Transportation	17,200	21,950	4,750	2.5
Communication	6,400	7,500	1,100	1.6
Utilities	2,700	2,400	-300	-1.2
Trades	82,150	110,550	28,400	3.0
Wholesale	15,650	18,900	3,250	1.9
Retail	66,500	91,650	25,150	3.3
Finance, insur., & real estate	24,000	31,850	7,850	2.9
Services & miscellaneous	73,950	108,550	34,600	3.9
Hotels	19,450	28,250	8,800	3.8
Government	78,900	91,700	12,800	1.5
Federal	31,000	32,000	1,000	0.3
Military	20,200	20,600	400	0.2
Other federal	10,800	11,400	600	0.5
State	35,950	46,550	10,600	2.6
Local	11,950	13,200	1,250	1.0
Agriculture	10,200	10,800	600	0.6
Sugar	4,450	4,300	-150	-0.3
Pineapple	2,300	2,100	-200	-0.9
Other agriculture	3,400	4,400	1,000	2.6
Non-agr. self-employed	21,650	26,750	5,100	2.1
Agriculture self-employed	4,700	3,650	-1,050	-2.5
Labor disputes	2,200	450	-1,750	-14.7

Source: Hawaii State Department of Labor and Industrial Relations and the Department of Planning and Economic Development, Economic Planning Information System (EPIS).

Table 2-3.-- CIVILIAN LABOR FORCE, BY SEX AND AGE: 1970 TO 1990

Category	Actual		Projected		Annual average change		
	1970	1980	1985	1990	Actual 1970-80	Projected 1980-85	1985-90
Total	294,484	435,780	488,400	533,400	14,100	10,500	9,000
Sex:							
Male	173,361	236,388	261,100	281,000	6,300	4,900	4,000
Female ..	121,123	199,392	227,200	252,500	7,800	5,600	5,100
Age:							
16 to 24	58,468	87,879	92,600	94,400	2,900	900	400
25 to 34	66,000	128,020	141,900	150,400	6,200	2,800	1,700
35 to 44	65,721	85,868	113,800	135,100	2,000	5,600	4,300
45 to 54	62,812	71,570	75,500	89,700	900	800	2,800
55 to 64	34,739	51,391	51,300	49,600	1,700	0	-300
65 & over	6,744	11,052	13,100	14,200	400	400	200

Source: U.S. Bureau of the Census, Census of Population; Detailed Population Characteristics, Hawaii, 1970 and 1980, tables 164 and 213; DPED, Hawaii Population and Economic Projection and Simulation Model (July 1984).

Table 2-4.-- CIVILIAN LABOR FORCE, BY SEX AND BY SELECTED OCCUPATIONS AND INDUSTRIES: 1970 AND 1980

[Persons 16 years and older]

Subject	1970		1980		Net change, 1970-80		Percent female	
	Male	Female	Male	Female	Male	Female	1970	1980
Total	173,361	121,123	236,388	199,392	63,027	78,269	41.1	45.8
By occupations:								
Managerial & professional occupations	36,001	23,060	56,485	43,407	20,484	20,347	39.0	43.5
Techn., sales, & admin. support	31,122	54,716	44,970	92,503	13,848	37,787	63.7	67.3
Service occupations	17,721	27,690	34,021	43,793	16,300	16,103	61.0	56.3
Farm, forestry, & fishing .	10,771	2,221	12,169	3,060	1,398	839	17.1	20.1
Precision prod., craft & repair	41,510	2,840	46,507	4,187	4,997	1,347	6.4	8.3
Operators, fabricators, & laborers	35,701	9,949	40,878	11,053	5,177	1,104	21.8	21.3
By industries:								
Agr., forestry, & fisheries	11,124	2,456	11,744	3,770	620	1,314	18.1	24.3
Mining	297	31	215	31	-82	-	9.5	12.6
Construction	25,874	1,756	29,982	2,595	4,108	839	6.4	8.0
Manufacturing	22,475	9,854	22,635	11,992	160	2,138	30.5	34.6
Trans., commun., & util. ..	20,798	6,113	26,006	11,712	5,208	5,599	22.7	31.1
Wholesale trade	8,220	3,722	10,942	5,744	2,722	2,022	31.2	34.4
Retail trade	21,839	29,201	37,840	48,700	16,001	19,499	57.2	56.3
Fin., ins. & real estate ..	6,843	7,699	13,404	18,986	6,561	11,287	52.9	58.6
Services	33,020	50,270	55,862	77,988	22,842	27,718	60.4	58.3
Public admin. (excluding education & hospitals) ..	22,336	9,374	26,400	16,485	4,064	7,111	29.6	38.4
Others and unknown	535	647	1,358	1,389	823	742	-	-

Source: U.S. Bureau of the Census, Detailed Population Characteristics, Hawaii (PC80-1-D13), table 217.

Table 2-5.-- CIVILIAN POPULATION, BY AGE: 1970 TO 1990

[Excludes military and dependents]

Age	1970	1980	1985	1990	Annual average change		
					1970-80	1980-85	1985-90
Total	657,345	844,274	937,200	1,017,900	18,700	18,600	16,100
Under 5	58,970	62,986	71,100	75,300	400	1,600	800
5 to 14	138,302	129,979	134,800	143,400	-800	1,000	1,700
15 to 24 ...	114,986	150,726	152,200	151,100	3,600	300	-200
25 to 34 ...	86,139	149,666	163,100	169,000	6,400	2,700	1,200
35 to 44 ...	81,702	99,533	130,200	151,800	1,800	6,100	4,300
45 to 54 ...	80,754	90,154	94,400	111,600	900	800	3,400
55 to 64 ...	52,563	85,627	90,100	91,800	3,300	900	300
65 & over ..	43,929	75,603	101,300	123,900	3,200	5,100	4,500

Source: DPED, Population Characteristics of Hawaii by Military Status, 1970 (Statistical Report 105, December 2, 1974), DPED, Hawaii Population and Economic Projection and Simulation Model (July 1984).

Table 2-6.-- COMPONENTS OF CHANGE IN THE RESIDENT POPULATION, BY MILITARY STATUS: 1970 TO 1980 AND 1980 TO 1984

Period and component	All groups	Armed forces	Civilian population			
			Military dependents	Not military dependents		
				Number	Annual average	Percent distrib.
1970 TO 1980 1/						
Net change	+194,778	+1,911	+2,165	+190,702	+19,070	100.0
Natural increase	118,654	-447	36,233	82,868	8,287	43.5
Live births	161,831	-	37,234	124,597	12,460	...
Deaths	43,177	447	1,001	41,729	4,173	...
Net mil. separations 2/	-	-1,815	-	+1,815	+181	1.0
Net migration	+76,124	+4,173	-34,068	+106,019	+10,602	55.6
1980 TO 1984 3/						
Net change	+74,039	+284	+3,060	+70,695	+16,634	100.0
Natural increase	57,138	-346	15,889	41,595	9,787	58.8
Live births	79,073	-	16,248	62,825	14,782	...
Deaths	21,935	346	359	21,230	4,995	...
Net mil. separations 2/	...	...	...	...	...	...
Net migration	+16,901	+630	-12,829	+29,100	+6,847	41.2

1/ April 1, 1970 to March 31, 1980.
2/ Separations less inductions for armed forces. Included with net migration after 1980.
3/ April 1, 1980 to June 30, 1984. Provisional.

Table 2-7.-- RESIDENCE AND MIGRATION OF ALL FIRST-TIME COLLEGE STUDENTS: FALL 1979 AND 1981

[First-time students are those students who are enrolled at the reporting institution for the first time at each of the following levels -- undergraduate, graduate, first-professional, or unclassified]

Category	1979	1981
Students enrolled in State 1/	15,450	16,235
Student residents of State 2/	16,411	17,318
Students remaining in State 3/	12,725	13,626
Migration of students:		
Out of State	3,686	3,692
Into State	2,725	2,609
Net out-migration	961	1,083

1/ All first-time students reported by the institution attended; i.e., all in-migrants (including foreign students) and "remaining" students.

2/ All students residing in Hawaii when first admitted to the reporting institution (whether in Hawaii, on the Mainland, or in outlying areas) at the current student level.

3/ Students who attend institutions in their home State.

Source: U.S. Department of Education, National Center for Education Statistics, Digest of Education Statistics 1981 (February 1981), p. 88, and Digest of Education Statistics 1983-84 (1984), p. 90.

STATISTICAL TABLES

Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII QUARTERLY: 1980 TO 1985

[In millions of dollars]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980				
1st Q	2,083,907	9,513	11.8	14.3
2nd Q	2,110,281	9,596	10.6	12.4
3rd Q	2,177,241	9,901	10.3	12.2
4th Q	2,255,412	10,232	11.4	13.1
1981				
1st Q	2,333,358	10,540	12.0	10.8
2nd Q	2,380,584	10,725	12.8	11.8
3rd Q	2,468,871	11,022	13.4	11.3
4th Q	2,497,551	11,228	10.7	9.7
1982				
1st Q	2,527,116	11,313	8.3	7.3
2nd Q	2,560,121	11,487	7.5	7.1
3rd Q	2,586,519	11,710	4.8	6.2
4th Q	2,629,632	11,699	5.3	4.2
1983				
1st Q	2,651,672	12,175	4.9	7.6
2nd Q	2,705,157	12,309	5.7	7.2
3rd Q	2,754,010	12,358	6.5	5.5
4th Q	2,827,017	12,743	7.5	8.9
1984				
1st Q	2,906,532	12,867	9.6	5.7
2nd Q	2,970,393	13,218	9.8	7.4
3rd Q (r) ..	3,039,942	13,386	10.4	8.3
4th Q (r) ..	3,082,902	13,535	9.1	6.2
1985				
1st Q	3,129,096	13,813	7.7	7.4

r Revised from previous publication of this report.
1/ Seasonally adjusted, annual rates.
Source: U.S. Department of Commerce, Bureau of Economic Analysis, July 1985.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE UNITED STATES AND HAWAII ANNUALLY: 1970 TO 1984

[In millions of dollars]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970	803,922	3,566	689,190	2,974
1975	1,258,643	5,785	1,090,778	5,000
1980 (r) .	2,156,715	9,810	1,820,880	8,312
1981 (r) .	2,420,098	10,878	2,033,353	9,243
1982 (r) .	2,575,759	11,604	2,172,768	10,079
1983 (r) .	2,735,829	12,570	2,332,700	10,790
1984 (r) .	3,020,259	13,547	2,586,213	11,767
	Percent change from previous year			
1980	11.0	13.0	10.9	12.8
1981	12.2	10.9	11.7	11.2
1982 (r) .	6.4	6.7	6.9	9.0
1983 (r) .	6.2	8.3	7.4	7.1
1984 (r) .	10.4	7.8	10.9	9.1

r Revised from previous publication of this report.

1/ Except where noted otherwise, these represent the latest official annual data and may not be completely consistent with more recently published quarterly data.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, printouts dated August 1985.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS FOR HONOLULU AND THE U.S. CITY AVERAGE: 1981 TO 1985

[1967=100]

Month and year	All items	Food	Housing 1/	Apparel and upkeep	Transportation	Medical care
Honolulu:						
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1983	273.5	306.7	257.5	207.7	253.7	357.6
1984	284.8	319.7	268.2	205.1	265.7	379.7
U.S. city avg.:						
1981	272.4	267.3	293.5	186.9	280.0	294.5
1982	289.1	278.2	314.7	191.8	291.5	328.7
1983	298.4	291.7	323.1	196.5	298.4	357.3
1984	311.1	302.9	336.5	200.2	311.7	379.5
Honolulu:						
1984: August .	286.0	322.7	268.2	199.7	268.7	384.1
October	287.4	322.6	271.0	200.1	268.5	384.3
December	289.8	331.3	271.1	203.2	268.2	386.8
1985: February	292.6	333.9	274.7	204.0	268.7	390.8
April ..	292.7	334.0	274.4	202.1	269.3	393.0
June ...	293.5	331.6	276.5	201.4	269.3	394.5
August .	294.2	331.3	274.3	204.1	271.7	408.3
U.S. city avg.:						
1984: August .	313.0	304.8	339.5	200.1	312.9	381.9
October	315.3	304.1	340.9	205.2	316.1	387.5
December	315.5	305.1	341.2	203.2	315.8	388.5
1985: February	317.4	309.5	343.6	201.8	314.3	393.8
April ..	320.1	308.7	345.9	205.9	320.0	398.0
June ...	322.3	309.3	350.4	204.6	321.8	401.7
August .	323.5	(NA)	(NA)	(NA)	(NA)	(NA)
Percent increase (Honolulu):						
1981 to 1982 ..	6.0	4.5	6.1	4.2	3.4	12.1
1982 to 1983 ..	2.2	2.6	1.0	3.1	-0.7	10.3
1983 to 1984 ..	4.1	4.2	4.2	-1.3	4.7	6.2
Aug. 1984 to Aug. 1985 ...	2.9	2.7	2.3	2.2	1.1	6.3

NA Not available.

1/ Change in calculation in 1983 -- housing costs measured in rental equivalence (what owners would have to pay if they rented their homes).

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1985

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,100	428,450	404,100	24,350	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	440,450	425,100	399,400	25,750	15,250	11,300	3,950	100
1983 (r) ..	448,550	433,300	406,200	27,100	15,100	11,200	3,900	150
1984 (r) ..	454,100	439,200	412,450	26,750	14,450	10,800	3,650	450
1984 (r)								
1st Q ...	450,050	436,550	409,900	26,650	13,350	9,650	3,700	150
2nd Q ...	456,950	442,300	414,850	27,450	14,650	11,050	3,600	0
3rd Q ...	454,550	438,350	411,300	27,050	15,850	11,950	3,900	350
4th Q ...	455,150	439,800	413,850	25,950	14,000	10,600	3,400	1,350
1985 (p)								
1st Q ...	457,150	444,550	418,450	26,100	12,350	9,150	3,200	250
2nd Q ...	460,300	446,700	420,600	26,100	13,450	10,400	3,050	150
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.0	-1.6	-1.6	5.6	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.4	-3.1	-90.0
1982	-1.0	-0.9	-1.3	6.0	-4.1	-2.5	-9.2	100.0
1983 (r) ..	1.8	1.9	1.7	5.2	-1.0	-0.9	-1.3	50.0
1984 (r) ..	1.2	1.3	1.5	-1.3	-4.3	-3.6	-6.4	211.1
1984 (r)								
1st Q ...	1.5	1.6	1.6	1.7	-1.4	-2.5	1.4	(X)
2nd Q ...	2.6	2.8	2.8	2.6	-1.7	-2.2	0.0	-100.0
3rd Q ...	0.5	0.7	1.0	-3.6	-2.5	-2.8	-1.3	0.0
4th Q ...	0.3	0.4	0.8	-5.6	-10.8	-5.4	-24.4	2,600.0
1985 (p)								
1st Q ...	1.6	1.8	2.1	-2.1	-7.5	-5.2	-13.5	66.7
2nd Q ...	0.7	1.0	1.4	-4.9	-8.2	-5.9	-15.3	(X)

r Revised.
p Preliminary.
x Not calculated -- data in base period equaled zero.
Note: Data rounded to nearest 50 and detail may not add to totals due to rounding.
1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.
Source: Hawaii State Departments of Labor and Industrial Relations, and Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1984 AND 1985

Series	1984	2nd Qrt. 1985 (p)	Percent change from previous year	
			1984	2nd Qrt. 1985 (p)
Total jobs 1/	454,100	460,300	1.2	0.7
Non-agricultural (wage & salary)	412,450	420,600	1.2	1.4
Construction	16,100	18,350	-9.6	8.3
Manufacturing	21,800	21,200	-2.5	-3.0
Food processing	10,950	10,550	-2.7	-3.2
Transp., commun., utilities ...	31,850	32,350	2.4	1.3
Trade	110,550	112,700	3.5	2.0
Wholesale	18,900	19,000	2.7	-0.3
Retail	91,650	93,650	3.6	2.4
Finance, insur., & real estate	31,850	32,150	-0.2	0.9
Services	108,550	109,850	3.4	0.7
Hotels	28,250	28,750	4.4	1.2
Government	91,700	94,050	0.4	1.5
Federal	32,000	32,550	-0.3	2.2
State	46,550	48,850	1.4	1.2
Local	13,200	12,650	-0.8	0.0
Agriculture (wage & salary)	10,800	10,400	-3.6	-5.9
Sugar	4,300	4,100	-4.4	-7.9
Pineapple	2,100	2,200	-8.7	-2.2
Diversified agriculture	4,400	4,100	-0.0	-6.8
Non-agricultural self-employed 2/	26,750	26,100	-1.3	-4.9
Agricultural self-employed 2/ ...	3,650	3,050	-6.4	-15.3
Labor disputes	450	150	200.0	(X)

p Preliminary.
X Not calculated -- data in base period equaled zero.
1/ Total of non-agricultural and agricultural wage and salary, self-employed, and jobs involved in labor disputes.
2/ Self-employed includes unpaid family workers and domestics.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1985

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	399,400	325,700	28,700	15,150	29,900
1983 (r)	406,200	330,100	29,350	15,700	31,050
1984 (r)	412,450	334,600	30,300	15,700	31,850
1984 (r)					
1st Q	409,900	333,100	29,800	15,600	31,350
2nd Q	414,850	336,950	30,100	15,800	32,000
3rd Q	411,300	332,950	30,550	15,850	31,950
4th Q	413,850	335,450	30,700	15,600	32,100
1985 (p)					
1st Q	418,450	338,600	31,150	16,000	32,700
2nd Q	420,600	340,200	31,350	16,100	32,950
	Percent change from same period in previous year				
1980	2.2	2.2	2.9	6.1	4.0
1981	-0.2	-0.2	1.4	0.6	3.5
1982	-1.3	-2.0	-0.4	-0.3	5.1
1983 (r)	1.7	1.4	2.3	3.6	3.8
1984 (r)	1.5	1.4	3.2	0.0	2.4
1984 (r)					
1st Q	1.6	1.5	1.9	1.3	3.5
2nd Q	2.8	2.7	3.1	1.6	1.5
3rd Q	1.0	0.7	3.9	-0.6	5.2
4th Q	0.8	0.6	3.9	-2.2	6.1
1985 (p)					
1st Q	2.1	1.7	4.5	2.6	4.3
2nd Q	1.4	1.0	4.2	1.9	3.0

r Revised.
p Preliminary.
Note: Data are rounded to nearest 50 and detail may not add to total due to rounding.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1985

[Number of persons]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force:					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	340,350	41,950	20,000	36,750
1981	450,000	347,000	44,250	20,650	39,150
1982	460,000	352,050	45,450	21,300	42,200
1983 (r)	472,000	359,150	46,600	22,150	44,100
1984 (r)	473,000	360,400	46,850	21,850	43,900
1984 (r)					
1st Q	470,000	358,800	46,150	21,750	43,300
2nd Q	476,250	363,100	46,900	21,950	44,300
3rd Q	472,850	358,850	47,400	22,100	44,550
4th Q	472,850	360,800	46,850	21,650	43,550
1985 (p)					
1st Q	472,900	360,800	46,600	21,650	43,800
2nd Q	482,800	367,500	48,000	22,200	45,100
Civilian employment:					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	324,750	39,300	19,050	34,850
1981	426,000	329,900	40,850	19,450	36,800
1982	430,000	330,550	41,050	19,550	38,850
1983 (r)	442,000	338,550	42,350	20,450	40,650
1984 (r)	446,000	341,350	43,100	20,350	41,200
1984 (r)					
1st Q	443,050	340,350	42,250	20,150	40,300
2nd Q	449,700	344,650	42,950	20,450	41,600
3rd Q	446,150	339,650	43,950	20,550	41,950
4th Q	445,100	340,700	43,250	20,250	40,900
1985 (p)					
1st Q	450,600	345,400	43,200	20,450	41,550
2nd Q	457,900	350,400	43,950	20,800	42,750

r Revised.
p Preliminary.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1985

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons):					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,650	950	1,900
1981	24,000	17,100	3,400	1,200	2,350
1982	31,000	21,500	4,450	1,700	3,350
1983 (r)	30,000	20,600	4,300	1,700	3,450
1984 (r)	27,000	19,050	3,750	1,500	2,700
1984 (r)					
1st Q	27,000	18,500	3,900	1,600	3,000
2nd Q	26,550	18,450	3,950	1,500	2,650
3rd Q	26,700	19,200	3,450	1,500	2,550
4th Q	27,750	20,150	3,600	1,400	2,600
1985 (p)					
1st Q	22,300	15,400	3,400	1,200	2,300
2nd Q	24,900	17,100	4,050	1,400	2,350
Unemployment rate (percent):					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.3	4.6	5.2
1981	5.4	4.9	7.6	5.9	6.0
1982	6.7	6.1	9.8	8.7	7.9
1983 (r)	6.5	5.7	9.2	7.6	7.8
1984 (r)	5.6	5.3	8.0	6.8	6.2
1984 (r)					
1st Q	5.7	5.4	9.2	7.9	7.4
2nd Q	5.6	5.4	9.2	7.3	6.4
3rd Q	5.6	5.7	7.8	7.3	6.1
4th Q	5.8	5.9	8.3	6.9	6.4
1985 (p)					
1st Q	4.7	4.3	7.3	5.5	5.3
2nd Q	5.2	4.7	8.4	6.3	5.2

r Revised.
p Preliminary.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1985

[Millions of dollars]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manufacturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1983	21,416.8	7,458.8	2,128.5	858.2	221.6	502.3
1984	23,879.9	8,182.7	2,396.1	1,008.6	257.6	530.1
1984						
1st Q	5,820.9	1,981.4	554.8	239.6	60.1	126.2
2nd Q	6,528.1	2,181.9	662.2	318.6	69.3	153.4
3rd Q	5,806.5	1,998.7	606.6	237.3	58.7	130.5
4th Q	5,724.3	2,020.8	572.5	213.0	69.5	120.1
1985						
1st Q	6,036.5	2,098.4	590.2	337.2	64.7	111.8
2nd Q	6,414.8	2,239.9	669.8	289.6	64.5	144.3
	Percent change from same period in previous year					
1984						
1st Q	13.2	9.2	11.2	6.8	10.6	15.2
2nd Q	18.4	14.4	16.8	45.4	18.0	22.4
3rd Q	3.5	3.3	10.0	6.1	7.9	-8.9
4th Q	11.1	12.0	12.0	11.8	28.4	-3.3
1985						
1st Q	3.7	5.9	8.3	40.7	7.7	-11.4
2nd Q	-1.7	2.7	1.2	-9.1	-6.9	-25.5

Note: This series derived by lagging reported excise tax base data one month to adjust for reporting delay.

Source: Hawaii State Department of Planning and Economic Development based on raw data from Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1982 TO 1985

[Thousands of dollars]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State General Fund 3/
1982	574,590	296,757	34,785	1,011,465
1983	615,536	358,072	27,960	1,109,876
1984	669,805	413,885	39,681	1,240,352
1984: 1st Q	165,120	112,154	9,588	293,272
2nd Q	173,806	81,345	14,681	313,706
3rd Q	165,634	111,966	10,437	317,326
4th Q	165,245	108,421	4,975	316,049
1985: 1st Q	174,054	108,567	7,522	315,085
2nd Q	178,697	100,301	21,903	344,413
	Percent change from corresponding period in previous year			
1982	-0.1	-15.1	-20.2	-5.5
1983	7.1	20.7	-19.6	9.7
1984	8.8	15.6	41.9	11.8
1984: 1st Q	6.0	18.9	48.5	9.5
2nd Q	9.0	50.1	57.1	15.9
3rd Q	9.3	3.7	-7.9	7.4
4th Q	11.0	6.6	498.7	14.6
1985: 1st Q	5.4	-3.2	-21.6	7.4
2nd Q	2.8	23.3	49.2	9.8

Note: This series represents data as reported by the Department of Taxation, without adjustment.

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1980 TO 1985

Year	Visitors staying overnight or longer			Average daily visitor census 3/	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,449	95,968
1982	4,242,925	3,278,525	964,400	94,740	105,310
1983	4,368,105	3,396,115	971,990	97,390	108,040
1984 (r)	4,855,580	3,721,380	1,134,200	106,260	118,660
1984 Jan.-Aug. ...	3,302,940	2,580,010	753,520	-	-
1st Q (r) ...	1,218,460	954,260	264,200	116,610	128,100
2nd Q (r) ...	1,206,810	923,040	283,770	102,210	114,960
3rd Q (r) ...	1,222,940	922,820	290,120	103,330	116,400
4th Q (r) ...	1,207,370	921,260	286,110	102,910	114,920
1985 Jan.-Aug. (p)	3,333,030	2,553,430	779,600	(NA)	(NA)
1st Q	1,301,480	1,011,810	289,670	120,770	(NA)
2nd Q (p) ...	1,124,650	838,910	285,740	91,300	(NA)
July-Aug. (p)	906,900	702,710	204,190	(NA)	(NA)
	Percent change from corresponding period in previous year				
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.9	8.6
1983	3.0	3.6	0.8	2.8	2.6
1984 (r)	11.2	9.6	16.7	9.1	9.8
1984 1st Q (r) ...	13.9	12.9	17.7	18.4	17.9
2nd Q (r) ...	12.6	11.5	16.6	8.7	9.8
3rd Q (r) ...	6.7	3.2	14.9	2.4	4.1
4th Q (r) ...	11.8	11.2	13.7	7.0	7.5
1985 Jan.-Aug. (p)	0.9	0.2	3.5	-	-
1st Q	6.8	6.0	9.6	3.6	-
2nd Q (p) ...	-6.8	-9.1	0.7	-10.7	-
July-Aug. (p)	3.3	4.6	-0.7	-	-

r Revised and rounded to the nearest 10; change from 20 percent to 10 percent sample size.
p Preliminary.
NA Not available.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
3/ Average number of westbound visitors present in the State.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS BY COUNTY: 1981 TO 1985

Year 1/	City and County of Honolulu	Hawaii County	Maui County	Kauai County
1981	2,398,477	672,683	1,389,892	757,811
1982	2,589,190	678,170	1,550,080	733,295
1983 (r).....	2,591,575	712,380	1,644,605	691,940
1984	2,901,320	760,940	1,854,690	814,590
1984: 1st Q	726,180	214,100	485,650	205,770
2nd Q	722,140	179,940	467,970	201,790
3rd Q	737,050	182,800	454,620	205,450
4th Q	715,950	184,100	446,450	201,580
1985: 1st Q (p)	748,930	205,530	520,740	224,030
2nd Q (p)	647,200	147,050	417,990	186,540
	Percent change from corresponding period in previous year			
1981	(NA)	(NA)	(NA)	(NA)
1982	3.0	0.8	11.5	-3.2
1983 (r).....	0.1	5.0	6.1	-5.6
1984	12.0	6.8	12.8	17.7
1984: 1st Q (r)	15.6	13.0	18.9	38.0
2nd Q (r)	11.8	11.3	19.0	18.6
3rd Q (r)	6.4	1.6	4.9	4.1
4th Q (r)	14.7	1.5	8.9	14.2
1985: 1st Q (p)	3.1	-4.0	7.2	8.9
2nd Q (p)	-10.4	-18.3	-10.7	7.6

r Revised from previous publication.
p Preliminary.
NA Not available.
1/ Data prior to 1981 are not comparable to later figures due to revisions. Beginning in 1984, sample size changed from 20 to 10 percent.
Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1985

[Percent; survey does not include some large hotel chains]

Date	State	Waikiki	Hawaii Island	Maui Island	Kauai Island
Annual average:					
1970	71.2	74.1	68.3	66.7	58.0
1975	74.1	78.3	59.9	72.3	77.2
1978	79.5	82.1	65.0	80.4	83.3
1979	73.8	77.1	62.0	73.0	76.5
1980	69.3	71.7	52.7	66.2	69.6
1981	68.2	73.9	44.9	70.3	62.7
1982	70.4	77.7	44.0	73.9	57.5
1983	70.3	76.3	46.3	75.2	57.2
1984	76.0	81.2	55.6	80.5	63.0
1985 (Jan-Aug) .	78.5	82.9 1/	59.4	81.1	68.0
1985					
January	84.4	92.1	64.0	83.4	66.6
February	92.8	95.2	83.3	95.5	85.4
March	87.1	90.0	71.7	91.3	84.4
April	73.7	74.7	56.4	83.6	66.3
May	67.6	69.4	46.3	76.7	59.0
June	66.0	74.3	38.9	64.3	51.5
July	75.9	84.8	53.8	72.1	63.5
August	81.4	(NA)	62.6	83.8	70.2

NA Not available.
1/ January to July.
Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

Table 6-4.-- EXISTING HOTEL UNITS BY GEOGRAPHIC AREAS: 1970 TO 1985

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110
1984	62,448	36,848	32,239	7,149	5,313	13,138
1985	65,919	38,600	33,879	7,511	5,656	14,152

Source: Hawaii Visitors Bureau, Visitor Plant Inventory.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES BY ISLANDS: 1970 TO 1985

[Dollars]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	(NA)	(NA)	(NA)	(NA)
1975	29.75	(NA)	(NA)	(NA)	(NA)
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
1983	55.58	47.62	50.49	81.60	59.75
1984	59.25	49.45	57.17	88.89	65.05
1985 (Jan-Aug)	68.93	57.38	64.43	99.23	71.34
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983	7.4	6.3	6.6	8.8	2.2
1984	6.6	3.8	13.2	8.9	8.9
1985 (Jan-Aug)	16.1	16.1	13.4	11.2	7.6

NA Not available.

Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS, AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1985

[Millions of dollars]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1983	1,334.2	685.2	296.2	203.2	185.9	277.9
1984	1,227.2	578.4	324.7	105.6	148.1	411.8
1984: 1st Q ..	332.1	145.8	75.5	32.3	38.0	65.9
2nd Q ..	365.0	154.4	89.7	29.8	34.9	124.8
3rd Q ..	297.1	136.0	73.0	24.2	38.9	84.1
4th Q ..	233.0	142.2	86.7	19.3	36.2	136.9
1985: 1st Q ..	268.6	196.1	130.0	30.1	35.9	52.1
2nd Q ..	347.4	226.9	158.3	25.4	43.1	51.4
	Percent change from corresponding period in previous year					
1983	0.8	0.3	-1.0	-16.3	31.8	-29.3
1984	-8.0	-15.6	9.6	-52.0	-20.3	48.2
1984: 1st Q ..	4.3	24.3	31.4	75.1	-8.2	-33.0
2nd Q ..	1.5	-1.6	34.1	-11.8	-38.0	427.0
3rd Q ..	-13.2	-35.7	-38.1	-49.3	-15.1	17.5
4th Q ..	-25.8	-28.8	60.6	-81.3	-14.7	62.6
1985: 1st Q ..	-19.1	33.2	72.3	-6.7	-5.4	-20.9
2nd Q ..	-4.8	46.9	76.6	-14.7	23.4	-58.8

NA Not available.

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1984

[Millions of dollars]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1983	685.2	366.8	86.7	140.5	91.3
1984	578.4	375.2	90.3	53.0	59.8
1984 1st Q ...	145.8	90.1	23.6	16.2	15.9
2nd Q ...	154.4	110.7	18.3	11.4	14.0
3rd Q ...	136.0	83.0	21.5	14.8	16.7
4th Q ...	142.2	91.5	26.9	10.7	13.2
1985 1st Q ...	196.1	119.2	46.0	14.6	16.3
2nd Q ...	226.9	96.8	19.9	15.2	95.1
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1983	0.3	-22.4	15.3	217.5	0.6
1984	-15.6	2.3	4.3	-62.3	-34.4
1984 1st Q ...	24.3	37.8	25.5	-24.3	34.7
2nd Q ...	-1.6	37.7	-17.6	-69.8	-15.1
3rd Q ...	-35.7	-40.4	-14.0	-53.7	9.4
4th Q ...	-28.8	11.6	29.8	-78.4	-72.3
1985 1st Q ...	33.2	32.3	94.5	-9.5	2.4
2nd Q ...	46.9	-12.6	8.3	33.6	578.4

NA Not available.
Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED BY AWARDING AGENCY: 1970 TO 1985

[Millions of dollars]

Year	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1983	277.9	84.7	126.8	66.4
1984	411.8	130.0	196.7	85.1
1984				
1st Q	65.9	8.7	38.9	18.3
2nd Q	124.8	33.2	78.0	13.6
3rd Q	84.1	5.9	58.4	19.8
4th Q	136.9	82.2	21.3	33.3
1985				
1st Q	52.1	7.4	7.9	36.8
2nd Q	51.4	15.9	27.3	8.3
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1983	-29.3	-39.3	-30.3	-6.7
1984	48.2	53.4	55.1	28.2
1984				
1st Q	-33.0	-25.7	-27.4	-44.7
2nd Q	526.0	478.3	828.5	42.3
3rd Q	17.5	-65.4	58.0	11.8
4th Q	62.6	63.1	-23.1	455.0
1985				
1st Q	-20.8	-14.3	-79.6	101.2
2nd Q	-58.8	-52.2	-65.1	-39.4

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1985

[Includes duplexes]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1983	3,417	1,627	938	291	561
1984	4,278	2,349	928	361	640
1984: 1st Q	1,092	651	224	70	147
2nd Q	1,160	654	252	96	158
3rd Q	1,115	568	250	111	186
4th Q	911	476	202	84	149
1985: 1st Q	802	329	151	85	149
2nd Q	1,236	650	251	88	247
	Percent change from corresponding period in previous year				
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1983	49.5	124.4	17.3	26.5	5.8
1984	25.2	44.4	-1.1	24.0	14.1
1984: 1st Q	21.9	38.2	-7.4	22.8	16.7
2nd Q	21.8	30.3	18.9	31.5	-4.2
3rd Q	29.4	43.4	4.2	38.8	27.4
4th Q	28.8	84.5	-17.2	3.7	20.2
1985: 1st Q	-26.6	49.5	-32.6	21.4	1.4
2nd Q	6.6	-1.0	-0.4	-8.3	56.3

Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1985

[Three or more units per structure]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1983	1,341	1,220	38	73	10
1984	1,134	942	153	35	4
1984: 1st Q	61	22	4	35	0
2nd Q	444	444	0	0	0
3rd Q	134	81	49	0	4
4th Q	495	395	100	0	0
1985: 1st Q	1,151	976	0	44	7
2nd Q	696	316	0	0	380
	Percent change from corresponding period in previous year				
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1983	-70.8	-70.3	-84.5	-38.1	-91.8
1984	-15.4	-22.8	302.6	52.0	60.0
1984: 1st Q	454.5	(X)	-63.6	(X)	(X)
2nd Q	264.3	298.0	(X)	-100.0	-100.0
3rd Q	-87.3	-91.6	81.5	-100.0	(X)
4th Q	376.0	279.8	(X)	(X)	(X)
1985: 1st Q	1,786.9	4,336.4	0	25.7	(X)
2nd Q	56.8	-28.8	(X)	(X)	(X)

X Not calculated -- data in base period equaled zero.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1985

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	21,900	36.2	19,800	3,500	15.0	13.13
1982	17,850	35.8	16,000	4,000	20.0	14.50
1983	17,800	37.2	16,500	2,850	17.2	15.80
1984	16,100	36.6	14,750	(NA)	(NA)	16.46
1984: 1st Q .	16,950	38.1	16,150	(NA)	(NA)	16.36
2nd Q .	16,950	35.8	15,150	(NA)	(NA)	16.51
3rd Q .	16,250	37.6	15,300	(NA)	(NA)	16.43
4th Q .	14,300	34.7	12,400	(NA)	(NA)	16.54
1985: 1st Q .	18,050	36.8	16,600	(NA)	(NA)	16.77
2nd Q .	18,600	36.0	16,650	(NA)	(NA)	16.73
	Percent change from corresponding period in previous year					
1980	2.4	0.6	3.1	55.9	(NA)	7.2
1981	-8.6	0.0	-7.1	32.1	(NA)	11.2
1982	-18.5	-1.1	-19.2	14.3	(NA)	9.4
1983 (r)	-0.3	3.9	3.4	-28.7	(NA)	9.0
1984	-9.6	-1.6	-10.9	(NA)	(NA)	4.2
1984: 1st Q .	-6.4	-1.3	-7.5	(NA)	(NA)	5.3
2nd Q .	-4.8	-4.8	-9.5	(NA)	(NA)	5.6
3rd Q .	-9.2	-1.1	-10.0	(NA)	(NA)	3.9
4th Q .	-18.3	1.2	-17.3	(NA)	(NA)	0.7
1985: 1st Q .	6.5	-3.4	2.8	(NA)	(NA)	2.5
2nd Q .	9.7	0.6	9.9	(NA)	(NA)	1.3

NA Not available.

1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.

2/ Equivalent number of jobs if all workers had worked a 40-hour week.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1985

[1967=100]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1983	331.5	276.5	400.9	352.1	294.6	402.0
1984 (r) ..	348.2	281.4	432.5	367.2	294.5	430.2
1984						
March ...	348.0	283.0	430.0	367.4	296.0	429.3
June (r)	347.4	280.4	431.8	367.1	294.1	430.4
Sept. (r)	352.2	281.6	441.2	370.2	293.7	436.6
Dec. (r)	350.4	278.7	441.0	369.1	291.6	436.4
1985						
March (r)	352.2	281.8	441.0	369.2	291.5	436.6
June	355.9	288.4	441.0	372.4	297.0	437.8
	Percent change from corresponding period in previous year					
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1983	8.8	10.3	7.5	6.6	4.7	7.8
1984 (r) ..	5.0	1.8	7.8	4.3	0.0	7.0
1984						
March ...	7.4	5.7	8.9	5.4	1.2	8.0
June (r)	3.2	-2.9	8.8	4.4	-0.1	8.0
Sept. (r)	4.2	-0.4	8.0	4.0	-1.0	7.2
Dec. (r)	3.2	-1.4	7.1	2.8	-1.8	5.7
1985						
March (r)	1.2	-0.4	2.6	0.5	-1.5	1.7
June	2.4	2.9	2.1	1.4	1.0	1.7

r Revised.
1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1984

[Millions of dollars]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1980	2,875	1,317.4	594.1	226.5
1981	3,200	1,449.3	327.9	217.6
1982	3,700	1,693.4	351.5	206.0
1983	3,974 (r)	1,848.2	410.2	219.0
1984	4,582 (r)	1,867.2	393.0	249.6

r Revised.

1/ Includes value of molasses.

Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaiian Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1985

[Millions of dollars]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1983	1,848.2	935.9	702.7	182.6	27.0
1984	1,867.2	948.2	685.2	207.6	26.2
1984					
1st Q	461.2	237.5	163.2	54.0	6.6
2nd Q	463.5	236.0	169.5	51.3	6.6
3rd Q	459.7	236.9	165.8	50.9	6.1
4th Q	482.8	237.8	186.8	51.3	6.9
1985					
1st Q	465.8	226.1	180.0	52.9	6.9
2nd Q	538.6	253.3	225.4	52.4	7.5
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1983	9.1	6.6	14.9	5.1	-9.7
1984	1.0	1.3	-2.5	13.7	-2.7
1984					
1st Q	-1.5	2.9	-12.9	23.3	0.4
2nd Q	2.3	-0.7	3.9	12.8	-5.6
3rd Q	-0.8	3.0	-7.0	6.3	-14.8
4th Q	4.2	0.1	7.3	13.0	11.4
1985					
1st Q	1.0	-4.8	10.3	-2.1	3.9
2nd Q	16.2	7.3	33.0	2.0	13.7

Note: Data include all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1985

Year	Value of shipments 1/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 2/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1983	421.5	174.2	25.3	-8.0
1984	427.2	213.3	1.4	22.4
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	43.1	47.4	49.1
1983				
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
3rd Q	136.2	50.9	35.4	-19.3
4th Q	79.4	50.3	-13.7	16.7
1984				
1st Q	90.1	53.6	-14.9	64.4
2nd Q	114.4	47.8	14.5	18.3
3rd Q	131.0	52.5	-3.8	3.0
4th Q	91.7	59.5	15.4	18.4
1985				
1st Q	84.6	35.4	-6.1	-34.0
2nd Q	87.5	32.7	-23.5	-31.5

NA Not available.

Note: These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 8-1, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

1/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

2/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- RECENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period	Number	Percent change	
				From preceding period	From same period in previous year
Resident population (r)					
State	Persons	July 1, 1984	1,039,000	-	2.0
City and County of Honolulu	Persons	July 1, 1984	805,300	-	1.6
Hawaii County	Persons	July 1, 1984	106,400	-	3.4
Kauai County	Persons	July 1, 1984	44,000	-	2.1
Maui County 2/	Persons	July 1, 1984	83,100	-	4.0
Income					
Total personal income 3/	$ Million	1st Qtr. 1985	13,813	2.1	7.4
Consumer price index (Honolulu)					
All items	(1967=100)	August 1985	294.2	0.2 4/	2.9
Food prices	(1967=100)	August 1985	331.3	-0.1 4/	2.7
Construction					
Total private permits	$ Million	2nd Qtr. 1985	226.9	15.7	46.9
Total residential permits	$ Million	2nd Qtr. 1985	158.3	21.8	76.6
New single-family units	Number	2nd Qtr. 1985	1,236	54.1	6.6
New multi-family units	Number	2nd Qtr. 1985	696	-39.5	56.8
Government contracts awarded	$ Million	2nd Qtr. 1985	51.4	-1.3	-58.8
Construction cost indexes (Hon.)					
Single family	(1967=100)	June 1985	355.9	-	2.4
High-rise buildings	(1967=100)	June 1985	372.4	-	1.4
Employment (r)					
Total civilian labor force	Persons	2nd Qtr. 1985	482,800	2.1	1.4
Civilian employment	Persons	2nd Qtr. 1985	457,900	1.6	1.8
Civilian unemployment	Persons	2nd Qtr. 1985	24,900	11.7	-6.2
Unemployment rate	Percent	2nd Qtr. 1985	5.2	-	-
Total jobs	Number	2nd Qtr. 1985	460,300	0.7	0.7
Visitor industry (r)					
Total visitors	Number	Jan-Aug 1985	3,333,030	-	0.9
Westbound	Number	Jan-Aug 1985	2,553,430	-	0.2
Eastbound	Number	Jan-Aug 1985	779,600	-	3.5
Visitor expenditures (p)	$ Million	1984	4,582	-	15.3
Hotel units	Number	Feb. 1985	65,919	-	5.5
Defense expenditures	$ Million	2nd Qtr. 1985	538.6	15.6	16.2
Sugar production	$ Million	1984	393.0	-	-4.2
Pineapple sales	$ Million	1984	249.6	-	14.0

r Revised.
p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ Includes Kalawao County.
3/ Seasonally adjusted at annual rate.
4/ From June.